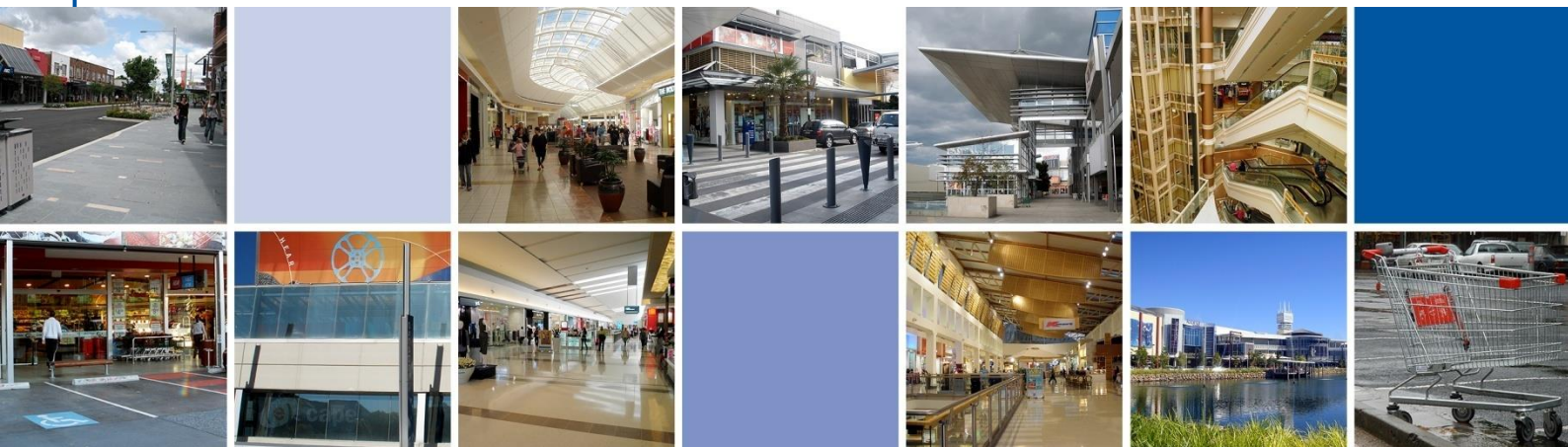


Shell Cove Boat Harbour

Social Infrastructure Assessment

April 2017



Prepared for:

Frasers Property Group

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Executive Summary

Overview

1. JBA is currently engaged by Frasers Property Group and seeks modification to the Shell Cove Boat Harbour Concept Plan Approval, under 75W of the Environmental Planning and Assessment ACT 1979, in response to design development, market trends, and to provide more flexibility in the future.
2. MacroPlan has been commissioned by Frasers Property Group (Frasers) to assess the potential social infrastructure impacts of the project revisions and in particular review any increased need for facilities such as schools, hospitals and community facilities.
3. This assessment examines the social infrastructure required to services the needs of the new Shell Cove Boat Harbour precinct. To ensure a detailed understanding of infrastructure needs is developed, all existing infrastructure within a 5 and 10km radius is reviewed in addition to the Shell Cove development. Population forecasting within this radius will then be used to understand key drivers and opportunities within the Boat Harbour precinct.

Project Objectives/ Scope

1. The Shell Cove project is a large scale, master-planned, urban development located on the New South Wales coast in the Shellharbour City region.
2. The overall project comprises development of over 3,000 residential dwellings with an estimated population of 9000 people, a 300 berth Boat Harbour, 18 hole championship golf course, district retail centre, community facilities and open space networks. The project is being designed to be destinational as well as residential
3. The Boat Harbour precinct that is the focus for this assessment consists of:
 - 1,556 residential dwellings within a mix of development density including 3 to 6 storey apartments, medium density dwellings and detached housing.
 - A hotel building, which spans up to 11 storeys, with flexibility to accommodate serviced and residential apartments.

- District retail centre incorporating a 3,000sqm supermarket and 6,000 - 8,000 sqm of specialty shops and commercial space
 - Marina commercial and maintenance facilities
 - Business Park with up to 30,000sqm GFA
 - Foreshore reserves and promenade
 - 2 lane public boat ramp and car and trailer parking (approved under separate consent); and
 - Wetland reserves.
4. When completed, the development will include a 4-star hotel with high quality conference facilities. The hotel will have the ability to accommodate and service large number of visitors to the region for both business and holiday purposes.

Demographic Context and Population Forecast

1. Population forecasts have been projected for a 10km radius around the site over the next 25-30 years. The area surrounding the site is a moderate growth area. This is shown in the table below.

10km radius Population and Dwelling Growth Forecasts – 2016 to 2036

	2016	2021	2026	2031	2036
Population	81,660	87,550	93,333	99,012	104,482
Number of Households	32,541	35,456	38,300	40,980	43,756
People Per Household	2.51	2.47	2.44	2.42	2.39

Source: MacroPlan (2017)

2. Overall, the catchment and surrounding area was found to be very similar to regional NSW in most socio-economic and demographic indicators. As of the 2011 Census, the population of Shell Cove and the greater Shellharbour LGA area was characterised by:
 - Household sizes slightly above state averages
 - Household incomes in Shellharbour (LGA) and the 10km catchment are approximately 5-10% below the NSW State average
 - While there is some variation across the different geographic areas, generally age distribution is in line with regional averages with the

exception of Shellharbour LGA's 5-14 year age bracket which is above the NSW State average.

- The proportion of family types was broadly in line with NSW State proportions. The proportion of couple families with children was slightly higher in the 10km catchment than the NSW State average.
- The 10km catchment and Shellharbour (LGA) both have above average proportions of owner & purchaser households.
- Shellharbour (LGA) and the 10km catchment have high proportions of low density dwellings.
- A smaller proportion of people were born overseas for the both the 10km catchment and Shellharbour (LGA) than the NSW State average.

3. While there is an element of ageing population within the 10km catchment, with the proportion of seniors set to double from 9,969 persons in 2016 to 20,675 persons in 2036, there is also considerable growth forecast in the younger age cohorts. The young persons and families will still make up the greatest proportion of the population.

Projected Population by Age Cohort within a 10km radius, Selected SA2 regions

	2015	2016	2021	2026	2031	2036
0-4	4,895	5,142	5,412	5,412	5,338	5,436
5-9	5,042	5,308	5,575	5,911	6,009	5,960
10-14	5,449	5,472	5,764	6,033	6,401	6,523
15-19	5,552	5,382	5,357	5,650	5,968	6,286
20-24	4,361	3,534	3,349	3,349	3,510	3,671
25-29	4,153	4,858	4,194	4,075	4,122	4,334
30-34	4,138	5,143	5,828	5,215	5,141	5,238
35-39	5,060	4,791	5,794	6,403	5,963	5,915
40-44	5,172	5,570	5,346	6,366	7,013	6,615
45-49	5,484	5,312	5,706	5,507	6,493	7,134
50-54	5,330	5,603	5,480	5,826	5,727	6,690
55-59	4,648	5,512	5,812	5,689	6,034	5,911
60-64	4,420	5,038	5,946	6,234	6,157	6,572
65-69	3,615	4,452	5,053	5,918	6,235	6,235
70-74	3,030	3,683	4,555	5,229	6,115	6,478
75-79	2,337	2,790	3,454	4,331	4,941	5,846
80-84	1,851	2,046	2,491	3,162	3,974	4,623
85+	1,409	2,025	2,435	3,021	3,871	5,015
Total	75,946	81,660	87,550	93,333	99,012	104,482

Source: MacroPlan (2017), NSW Population Projections (2016), and ABS Census (2011)

Community Infrastructure Best Practice, Approaches and Standards

1. There are various approaches to community infrastructure planning and provision. These include:
 - Hierarchical provision (using a regional, local and state framework) – which allow provision to key market / community catchments and
 - Integrated approach which seeks to combine different facilities and which can leverage the benefits and synergies of different facilities.
2. In addition, a set of principles have been developed to help guide the development of community infrastructure. These include:
 - Hierarchy of facilities / settings
 - Hubbing / co-location integration
 - Multiuse
 - Flexibility (change function over time)
 - Targeted to local needs / demands
 - Activity generators (day / night) / active programming
 - Access (disability access and transport)
 - Visibility (highly visible location)
 - Safety / security (passive surveillance)
 - Avoid duplication
 - Contribute to health, wellbeing and capacity
 - Promote social equity
 - Seek sustainable approaches to management, funding and maintenance (capital and operating) e.g. whole of life costs and
 - Create local competitive advantage, uniqueness and identity
3. In order to assess the demand for community infrastructure arising from the Boat Harbour precinct, MacroPlan has developed community infrastructure standards that take into consideration:
 - Community infrastructure standards from the Development Code produced by the Growth Centres Commission/GCC (October 2006). The standards relate a range of community infrastructure facilities to current and emerging populations.
 - Demand / population projections (also using specific groups where required, for example 70+ or children aged 0-4) in the precinct.
 - Estimates of current and future supply of community/social infrastructure within a 5km or 10km catchment.
 - Previous lessons and experience in community infrastructure.

It is noted that the demand / supply balance uses different catchments (with the supply catchment covering a larger area). Hence, care must be taken in interpreting the results as the number of facilities provided by the economic model (the balance between supply and demand) must take into account possible usage and travel patterns (which will be determined in part by distance and the nature of the facility). For example, some residents may consider facilities 5km too far. Hence, this may require a smaller facility closer to a local population. This is most evident in the provision of community infrastructure such as primary schools or public open space where a small neighbourhood park can meet local needs within a 500m radius, while a regional park will attract users from larger distances.

Community Infrastructure Needs Assessment

1. Due to the small residential size of the Boat Harbour precinct, there are limited community infrastructure requirements that can be assigned specifically to the development site that include:

- 2 – 3 large scale RACFs
- 1 high school
- 1 community health facility
- 2 – 3 local community centres and 1 district community centre
- 8.04 ha of open space that includes 1 – 2 neighbourhood parks

These infrastructure requirements are being addressed through planned infrastructure in the Boat Harbour Masterplan or surrounding community infrastructure as outlined in the below points.

2. The results of the overall community infrastructure assessment for the Shell Cove Boat harbour precinct are shown in the table overleaf.

Policy / Strategy Summary (& comparison with previous assessment in 2008)

Community Infrastructure Type	Comment / Recommendation
NSW Fire Stations	<p><i>From 2008 to now there has been a 67% increase in numbers of NSW Fire Stations, reflecting the increasing demand for Fire Services arising from the recent residential development.</i></p> <p><i>In our view, there is adequate supply of fire stations in the catchment radius. However, further consultation will need to occur with appropriate authorities for provision in the future as growth occurs.</i></p>
NSW Ambulance Service	<p><i>From 2008 to now there has been a 100% increase in numbers of NSW Ambulance Stations, reflecting the increasing demand for ambulance services arising from the recent residential development, particularly the Dapto and Calderwood regions.</i></p> <p><i>There is likely to be an adequate supply of ambulance stations in the catchment radius, further consultation will need to occur with appropriate authorities for provision in the future as growth occurs.</i></p>
NSW Police Service	<p><i>From 2008 to now there has been a 200% increase in the numbers of NSW Police Stations, reflecting the increasing demand for Police Service arising from the recent residential development.</i></p> <p><i>In our view, there is adequate supply of police stations in the catchment radius. However, further consultation will need to occur with appropriate authorities for provision in the future as growth occurs.</i></p>

Primary schools	<p><i>From 2008 to now there has been a 29% increase in numbers of primary schools, reflecting the increasing demand for primary schools arising from the recent residential development.</i></p> <p><i>In our view, there is adequate supply of primary schools in the catchment radius. According to our assessment, there is an already high level of supply of primary schools in the area.</i></p> <p><i>The development site will not require a primary school according to MacroPlan's community infrastructure standards.</i></p>
Secondary schools	<p><i>From 2008 to now there has been a 33% increase in numbers of high schools, reflecting the increasing demand for high schools arising from the recent residential development.</i></p> <p><i>In our view, there is currently adequate supply of high schools in the catchment radius. According to our assessment, there is an already high level of supply of high schools in the area to 2026.</i></p> <p><i>However, the Boat Harbour development will contribute to catchment demand for an additional high school (anecdotally about 20-30%).</i> According to our assessment, one high school might be needed in the long term (2026 onwards) but further consultation will need to occur with appropriate authorities for provision in the future as growth occurs.</p> <p><i>MacroPlan recommends no less than 6,000 m² should be allocated for one high school at the subject site.</i></p> <p><i>We also note that there are 4 secondary schools located in the 5km catchment radius, particularly Shellharbour Anglican College is located across the road from the western entrance of Shell Cove.</i></p>

	<p><i>Further assessment on the current capacity, demand and potential to redevelop the area's existing high schools first.</i></p>
Community Health Facility	<p><i>According to MacroPlan's community infrastructure standards, there will be a need for additional community health facilities to be incorporated into the development.</i></p> <p><i>Although provision ratios demonstrate a strong need for community health facilities in the 10km catchment radius, this demand should be met within other local areas in the catchment radius by the relevant authorities and other facilities (e.g. Shellharbour private and public hospitals etc).</i></p> <p><i>The Shell Harbour Boat Harbour Concept Plan should include one (1) community health facility of some 2,000 m².</i></p> <p><i>In our view, the new community health facility at Shell Cove Boat Harbour should provide integrated general practice and community health services, which will service the identified 10km radius area, providing a range of district level facilities covering:</i></p> <ul style="list-style-type: none"> <i>• Counselling</i> <i>• Primary Health Nursing</i> <i>• Diabetes Educator</i> <i>• Diabetes Dietician</i> <i>• Podiatry</i> <i>• Eating Disorders Dietician</i> <i>• Heart Failure</i>

	<ul style="list-style-type: none"> • <i>Paediatric Audio</i> • <i>Palliative Care Volunteer Coordinator</i> • <i>Palliative Care Counsellor</i> • <i>Parkinson's Nurse</i> • <i>Stoma Nurse</i> • <i>Women's Health</i>
Regional Health Facilities	<p><i>From 2008 to now there has been a 64% increase in numbers of hospital beds, reflecting the increasing demand for regional health facilities arising from the recent residential development.</i></p> <p><i>In our view, there is already a sufficient supply of current regional health facilities to accommodate growth demand from the subject site, associated with the proposed higher number of dwellings (and with the potential Shellharbour Hospital redevelopment¹).</i></p>
Aged Care Centre	<p><i>From 2008 to now there has been a 91% increase in numbers of residential aged care places (combined High and Low care places), reflecting the increasing demand for aged care services and the rapidly ageing population profile in the region.</i></p> <p><i>In our view, there is already a sufficient level of supply of residential aged care facilities in the catchment with the potential six (6) new aged care facilities in the pipeline to year 2021. However, two or three large-scale residential aged care facilities might need to be constructed in the long term (2026 onwards) but the private sector could meet this demand. Government should facilitate private investment in the catchment area.</i></p>

¹ Shellharbour Hospital Redevelopment Health Partnerships (weblink: https://www.islhd.health.nsw.gov.au/Shellharbour_Hospital/SHH_Redevelopment.asp)

	<p><i>We note that the Commonwealth Government is shifting its funding focus from RACF to home care packages. This shift in policy will be an increasingly important feature of service deliver over time. The new policy environment suggests the projection of a service shortage by 2026.</i></p> <p><i>Moreover, home care packages can be delivered more efficiently when retirees are colocated. This outcome is more likely at the subject site, due to the predominance of apartments.</i></p>
Youth facility	<p><i>From 2008 to now there has been a 200% increase in numbers of youth centres, reflecting the increasing demand for such facilities and services arising from the recent residential development.</i></p> <p><i>According to MacroPlan's community infrastructure standards, there will not be a need for additional youth centre(s) to be incorporated into the development site. In our view, there is already a good level of supply of current regional health facilities.</i></p>
Community Service Centre	<p><i>From 2008 to now there has been a 100% increase in numbers of community service centres, reflecting the increasing demand for community service arising from recent population growth.</i></p> <p><i>In our view, there is adequate supply of community service centres within the catchment area.</i></p>
Local & District Community Centre	<p><i>From 2008 to now there has been a 130% increase in the number of local community centre, reflecting the increasing demand for local community centres arising. There has been no change in numbers of district community centre since 2008.</i></p>

	<p>However, there is still inadequate supply of local community centres within the catchment area. According to provision ratios there will be urgent needs for local community centres within the development site.</p> <p>Furthermore, there is the opportunity for Shell Cove to become a district community centre to cater to undersupply within the catchment area. According to provision ratios there will be a need for more district community centres within the Shell Cove and the surrounding regions.</p>
Child care	<p>From 2008 to now there has been a 78% increase in numbers of child care places, reflecting the increasing demand due to more young families living in the region.</p> <p>In our view, there is adequate supply of such services within the catchment area. According to MacroPlan's community infrastructure standards, there will not be a need for additional childcare facility to be incorporated into the development site.</p>
After school	<p>From 2008 to now there has been a 128% increase in numbers of after-school care places, reflecting the increasing demand due to more young families living in the region.</p> <p>Although there is identified need for after school facilities to be constructed in the short term within the 10km catchment radius, the existing arrangement at Shell Cove Primary School for after school care will meet this identified need within the development site.</p>
Library	<p>From 2008 to now there has been a 25% increase in numbers of library, reflecting the increasing demand due to more population living in the region.</p>

	<p><i>There are adequate levels of library services within the catchment area.</i></p>
<p>Performing arts / cultural centre</p>	<p><i>From 2008 to now there has been a 200% increase in numbers of such facilities, reflecting the increasing demand due to more population living in the region.</i></p> <p><i>There is adequate supply of performing arts / cultural facilities in the catchment area.</i></p>

Section 1: Introduction

1.1 Overview

MacroPlan Australia has been commissioned by Frasers Property Group (Frasers) to assess the potential social infrastructure impacts of the Shell Cove development and in particular review any increased need for facilities such as schools, hospitals and community facilities.

JBA is currently engaged by Frasers and seeks for modification to the Shell Cove Boat Harbour Concept Plan Approval, under 75W of the Environmental Planning and Assessment ACT 1979, in response to design development, market trends, and to provide more flexibility in the future.

This assessment looks at the social infrastructure required to services the needs of the new Shell Cove Boat Harbour precinct. To ensure a detailed understanding of infrastructure needs is developed, all existing infrastructure within a 5 and 10km radius will be reviewed in addition to the Shell Cove development. Population forecasting within this radius will then be used to understand key drivers and opportunities within the Boat Harbour precinct.

1.2 Project Objectives/ Scope

The Shell Cove project is a large scale, master-planned, urban development located on the New South Wales Coast in the Shellharbour City region, being jointly developed by Frasers and Shellharbour City Council.

The overall project comprises development of over 3,000 residential dwellings with an estimated population of 9,000 people, a 300 berth Boat Harbour, 18 hole championship golf course, district retail centre, community facilities and open space networks.

The Boat Harbour precinct that is the focus for this assessment consists of:

- 1,556 residential dwellings within a mix of development density including 3 to 6 storey apartments, medium density dwellings and detached housing;

- A hotel, which spans up to 11 storeys, with flexibility to accommodate serviced and residential apartments;
- District retail centre incorporating a 3,000sqm supermarket and 6 - 8,000 sqm of specialty shops and commercial space;
- Marina commercial and maintenance facilities;
- Business Park with up to 30,000sqm GFA;
- Foreshore reserves and promenade;
- 2 lane public boat ramp and car and trailer parking (approved under separate consent); and
- Wetland reserves.

When completed, the development will include a 4-star hotel with high quality conference facilities. The hotel will have the ability to accommodate and service large number of visitors to the region for both business and holiday purposes.

1.3 Information Sources

This report draws on a wide range of information sources. The more important information sources include:

- Population Projections, NSW Department of Planning and Environment (2016).
- Census of Population and Housing, Australian Bureau of Statistics (2006& 2011).
- Australian Bureau of Statistics.
- Relevant experience throughout Victoria and Australia, with particular reference to socio-economic profiles, area trends, and recent market performance.

1.4 Abbreviations

The following abbreviations are used in this report

- ABS Australian Bureau of Statistics
- LGA Local Government Area
- SLA Statistical Local Area

1.5 Report Limitations

This report is prepared on the instructions of the party to whom it is addressed and is thus not suitable for the use other than by that party. As the report involves future forecasts, it can be affected by a number of unforeseen variables. It represents for the party to whom or which it is addressed the best estimates of MacroPlan, but no assurance can be given by MacroPlan that the forecasts will be achieved.

Section 2: Location and Catchment Context

2.1 Overview

This section discusses location and catchment context.

2.2 Shellharbour City Council

Shellharbour is one of the state's youngest cities, having been gazetted in January 1996, but today ranks as one of the most progressive non-metropolitan communities in New South Wales.

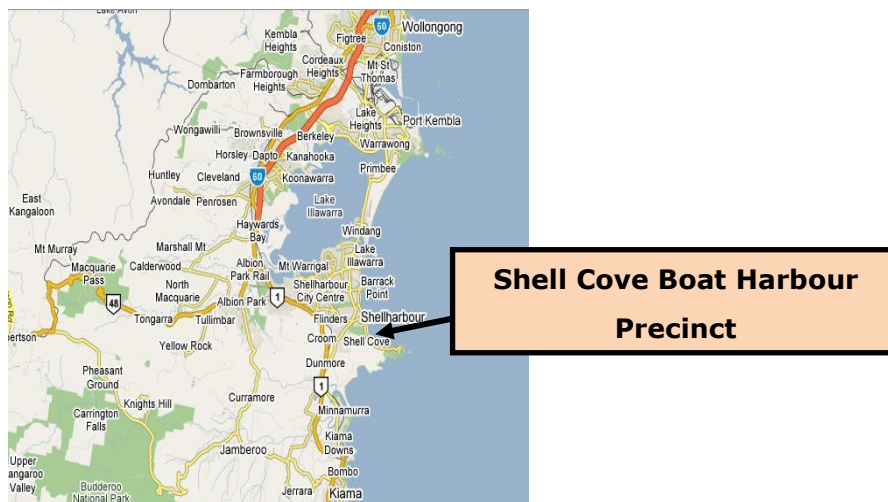
The LGA serves a community of approximately 71,200 residents across an area of 154 square kilometres with anticipated community growth of 19,250 persons by 2036.

2.3 Locational Setting

The site sits within the Shellharbour SA2 area, (as defined by the ABS), and is located 17km south of Wollongong.

As illustrated in the map below, the site is located adjacent to the Pacific Ocean with frontage to Shellharbour beach. The site is accessed via Shellharbour Road, which intersects with the Princess Highway at Dunmore.

Regional Location Map



Source: MacroPlan (2017)

2.4 Development Details

The overall project comprises development of a community with over 3,000 residential dwellings, a 300 berth Boat Harbour, 18 hole championship golf course, district retail centres, community facilities and open space networks.

Approved Concept Plan



Source: COX Richardson (2017)

The terms of the **current** Shell Cove Boat Harbour Concept Plan Approval are as follows:

- Up to 1,238 dwellings with a total gross floor area of approximately 150,000m² comprising single dwellings, medium density and apartments.
- A business park with a maximum gross floor area of 30,000m².
- Retail/commercial/hotel/community development with a maximum gross floor area of 22,000m².
- Public open space and wetlands.
- Associated drainage, stormwater infrastructure and roads.

The details of the proposed modifications to the aforementioned approval are as follows:

- Up to 1,556 dwellings comprising single dwellings, medium density and apartments.
- Increase the maximum height of the residential flat buildings from 4 storeys to 6 storeys in parts of the Shell Cove Town Centre.
- Relocate the proposed Shell Cove Town Centre hotel and increase its maximum height from 9 storeys to 11 storeys.
- Allow the additional permit for both serviced and residential apartments development in the hotel building(s) .
- Retail and commercial development combined retains with a maximum gross floor area of 22,000m².

Revised Concept Plan Principles



Source: COX Richardson (2017)

The current masterplan for development of the Shell Cove project includes the following elements:

BOATHARBOUR PRECINCT	
Boatharbour	<ul style="list-style-type: none"> 300 Floating berths
Boat Maintenance	<ul style="list-style-type: none"> Travel lift Hardstand for 12 to 14 boats Small commercial building of approximately 400 sqm housing repair and maintenance services, ship chandlers, etc Fuelling wharf Sewer pump out
Dry Stack (under review)	<ul style="list-style-type: none"> Potential dry stack for up to 150 boats
Public Boat Ramp	<ul style="list-style-type: none"> 2 lane public boat ramp with car and trailer parking
Retail	<ul style="list-style-type: none"> Main Street mixed use district centre 5,800 sqm retail including supermarket of 3,500 sqm 1,000 sqm of commercial space 1,200 sqm of tourism based retail – eg tavern, restaurants, etc
Hotel	<ul style="list-style-type: none"> 4 Star hotel with supporting restaurant, bar, conference, reception and service areas
Residential	<ul style="list-style-type: none"> 778 apartments 459 medium density 319 detached
Business Park (employment generating lands)	<ul style="list-style-type: none"> 30,000sqm GFA of commercial space in business park
Community Uses	<ul style="list-style-type: none"> Community Centre to be located within main street retail centre
BALANCE OF SHELL COVE PROJECT	
Residential	<ul style="list-style-type: none"> 2010 dwellings comprising 1,764 residential allotments and 246 medium density dwellings. Note- to date approximately 1,200 residential lots have been developed
School	<ul style="list-style-type: none"> Public Primary school developed by Dept Education – year K to 6
Childcare	<ul style="list-style-type: none"> 3 child care centres

2.5 Catchment Definition

The following maps show the Shell Cove development location in context to surrounding LGA boundaries and 10km catchment area. The 10km catchment radius takes in suburbs from the LGAs of Kiama, Wollongong and Shellharbour. The suburbs are:

10km Catchment Suburbs

Minnamurra	Yallah	Kiama Downs	Shell Cove	Primbee
Albion Park	Lake Illawarra	Oak Flats	Mount Warrigal	Dunmore
Warilla	Albion Park Rail	Bombo	Windang	Shellharbour
Barrack Heights	Croom	Blackbutt	Kiama	Barrack Point
Flinders				

Shell Cove 5km and 10km Catchment Area Map



Source: MacroPlan (2017)

2.6. Study and Modelling Assumption Limitations

The study is based on a series of assumptions and principles on which the modelling and other work is based upon.

As such, the forecasts should be used as a guide in the development of future plans for the community over time and it is important to recognise that changes in the assumptions and the surrounding environment could influence the results. These changes could include release of new land and / or the development of new housing opportunities elsewhere locally or in NSW, a shift in the demographic profile in the area (for example, an exit of the older population and a stronger than expected increase in the number of families entering the region).

Section 3: Policy Context

3.1 Overview

This section discusses the key policy drivers affecting the current study.

Illawarra-Shoalhaven Regional Plan

The Illawarra Region is framed by the natural features of the Illawarra Escarpment and coastline. It is home to more than 400,000 people, delivered \$16.2 billion in economic output to the State (in 2013), and the regional city of Wollongong. The southern portion of the region is characterised by cultural landscapes and agricultural lands that provide a long-term resource for sustainable food production.

According to the latest NSW population projections, by 2036, the region's population is expected to increase by 60,400 people from 2016. The Regional Plan aims to ensure that adequate housing is available and appropriately located to sustainably accommodate the region's sustainable economic growth over the next 20 years. The Plan also integrates economic, social and environmental considerations in the interests of achieving ecologically sustainable development for the region.

Selected items with most relevance to the subject area as follows:

- Develop a stronger marine-based tourism industry, capitalising on the region's numerous small ports and building on The Waterfront, Shell Cove marine facility
- Deliver housing in new release areas best suited to build new communities, provide housing choice and avoid environmental impact Established and smaller release areas will add to the diversity of supply such as Shell Cove, Tullimbar, Haywards Bay, South Kiama, West Culburra, Vincentia, Sussex Inlet, Manyana and Milton-Ulladulla.
- Sequence release areas, in the vicinity of mineral resources, to allow the continuation of working extraction activities. In addition, identified release areas such as Shell Cove (near Bass Point Quarry) and Spring Creek (near Bombo Quarry) have sequenced development so that working quarries can

continue to operate. This approach to the staged rollout of new release areas in the vicinity of extractive operations should continue.

The Plan applies to the four local government areas of Kiama, Shellharbour, Shoalhaven and Wollongong. The Plan will be reviewed every five years. The implementation of these actions, in the Regional Plan, will be the responsibility of the NSW Government, the four local Councils and the Illawarra Pilot Joint Organisation (JO).

Section 4: Demographic Context

4.1 Overview

This section discusses the current and emerging demographic context of the catchment and precinct under investigation.

4.2 Current Demographic Profile and Composition

Overall, the catchment and surrounding area was found to be very similar to regional NSW in most socio-economic and demographic indicators. As of the 2011 Census, the population of Shell Cove and the greater Shellharbour LGA area was characterised by:

- Household sizes slightly above state averages (differ from 2006 Census).
- Household incomes in Shellharbour (LGA) and the 10km catchment are approximately 5-10% below the NSW State average.
- While there is some variation across the different geographic areas, generally age distribution is in line with regional averages with the exception of Shellharbour LGA's 5-14 age brackets which is above the NSW State average.
- The proportion of family types was broadly in line with NSW State proportions. The proportion of couple families with children was slightly higher in the 10km catchment than the NSW State average.
- The 10km catchment and Shellharbour (LGA) both have above average proportions of owner & purchaser households.
- Shellharbour (LGA) and the 10km catchment have high proportions of low density dwellings.
- A smaller proportion of people were born overseas for the both the 10km catchment and Shellharbour (LGA) than the NSW State average. Although these proportions were higher than the NSW Regional average.

The Key Indicators are provided in the figure overleaf. This includes a comparison of each of the socio-economic characteristics in the 10km catchment and Shellharbour (LGA) to NSW State averages.

Shell Cove Catchment Key Indicators Table (2011 Census)

	10km catchment	Shellharbour LGA	Sydney Metropolitan Area	New South Wales Regional Balance	New South Wales
Headline Indicators (2006)					
Population and Households					
Persons	78,732	63,605	4,391,674	2,512,949	6,917,658
Households	28,454	22,437	1,521,398	949,903	2,471,299
<i>Average Household Size</i>	2.77	2.70	2.70	2.40	2.60
Socio-Economic Snapshot					
Income and Wealth					
<i>Average Household Income</i>	\$61,335	\$58,552	\$75,244	\$49,972	\$64,324
variation from NSW State average	-4.6%	-9.0%			
<i>Average Mortgage Repayment</i>	\$23,441	\$22,800	\$26,004	\$18,720	\$23,916
variation from NSW State average	-2.0%	-4.7%			
Occupation					
Clerical and Administrative Workers	14%	14%	16%	13%	15%
Community and Personal Service Workers	11%	12%	9%	11%	10%
Labourers	10%	11%	7%	11%	9%
Machinery Operators And Drivers	8%	10%	6%	8%	6%
Managers	10%	9%	13%	13%	13%
Professionals	17%	14%	26%	17%	23%
Sales Workers	11%	11%	9%	10%	9%
Technicians and Trades Workers	16%	18%	12%	15%	13%
Demographic Snapshot					
Age Distribution					
0-4 years	6%	7%	7%	6%	7%
5-14 years	14%	15%	12%	13%	13%
15-24 years	13%	14%	13%	12%	13%
25-54 years	39%	40%	44%	37%	42%
55-64 years	13%	11%	11%	13%	12%
65 years and over	15%	14%	13%	18%	15%
Family Types					
Couple family with children	37%	38%	39%	30%	36%
Couple family without children	13%	15%	12%	13%	13%
One parent family	1%	1%	1%	1%	1%
Other Family	0%	0%	0%	0%	0%
Lone Households	18%	17%	18%	21%	19%
Group Households	1%	1%	3%	2%	3%
	0%				
Tenure Type					
Owner	39%	34%	31%	39%	34%
Purchaser	33%	38%	36%	32%	34%
Renter	27%	27%	32%	28%	31%
Other	1%	1%	1%	1%	1%
Dwelling Type					
Separate House	78%	84%	61%	85%	70%
Semi-detached	16%	11%	13%	7%	11%
Flat, Unit, Apartment	7%	5%	26%	8%	19%
Birthplace					
Australia	76%	78%	60%	84%	69%
Overseas	24%	22%	40%	16%	31%

Source: MacroPlan (2017) and ABS Census (2011)

4.3 Current Demographic Profile and Composition

According to our population projections in the catchment area², the 10km catchment population of the region is expected to increase to 87,550 persons by 2021 and 104,482 persons by 2036. This represents approximately 23,000 person increase between 2016 and 2036, at an average rate of 1.2% per annum.

Projected Population by Age Cohort within a 10km radius, Selected SA2 regions

	2015	2016	2021	2026	2031	2036
0-4	4,895	5,142	5,412	5,412	5,338	5,436
5-9	5,042	5,308	5,575	5,911	6,009	5,960
10-14	5,449	5,472	5,764	6,033	6,401	6,523
15-19	5,552	5,382	5,357	5,650	5,968	6,286
20-24	4,361	3,534	3,349	3,349	3,510	3,671
25-29	4,153	4,858	4,194	4,075	4,122	4,334
30-34	4,138	5,143	5,828	5,215	5,141	5,238
35-39	5,060	4,791	5,794	6,403	5,963	5,915
40-44	5,172	5,570	5,346	6,366	7,013	6,615
45-49	5,484	5,312	5,706	5,507	6,493	7,134
50-54	5,330	5,603	5,480	5,826	5,727	6,690
55-59	4,648	5,512	5,812	5,689	6,034	5,911
60-64	4,420	5,038	5,946	6,234	6,157	6,572
65-69	3,615	4,452	5,053	5,918	6,235	6,235
70-74	3,030	3,683	4,555	5,229	6,115	6,478
75-79	2,337	2,790	3,454	4,331	4,941	5,846
80-84	1,851	2,046	2,491	3,162	3,974	4,623
85+	1,409	2,025	2,435	3,021	3,871	5,015
Total	75,946	81,660	87,550	93,333	99,012	104,482

Source: MacroPlan (2017), NSW Population Projections (2016), and ABS Census (2011)

Notably, much of the population growth is expected to come from the 70+ age cohorts at an average of 3.7% pa over the 20 years to 2036. Within this age group, the 80-84 and 85+ age cohorts will experience the rapid growth at 4.2% and 4.8%, respectively.

² Our population projection adopts the NSW projected population growth rates of the corresponding aged groups in the selected LGAs – Shellharbour, Wollongong and Kiama

Section 5: Community Infrastructure

5.1 Overview

This section provides a theoretical and practical framework to help guide the development of community infrastructure.

In particular, the section discusses:

- Current emerging trends in community infrastructure
- Best-practice examples
- Principles
- Standards for consideration.

5.2 Community Infrastructure Approaches

There are various approaches to community infrastructure planning and provision. These include:

- Hierarchical provision (using a regional, local and state framework) – which allow provision to key market / community catchments and
- Integrated approach which seeks to combine different facilities and which can leverage the benefits and synergies of different facilities.

Often these approaches are combined. The current study adopts a combined approach to leverage the key benefits of each.

5.3 Community Infrastructure Principles

A set of principles have been developed to help guide the development of community infrastructure.

These include:

- Hierarchy of facilities / settings – regional, district and local facilities each perform a different role. As such, sizing and features will differ by the level of the community
- Hubbing / co-location integration - combining facilities helps to leverage the benefits of each and improves the product offering and financial viability of each. Activation is also improved through co-location

- Multiuse – A diversity of uses improves activation, diversity and the flexibility of facilities. Multiuse facilities also make facilities more dynamic making them more responsive to the needs and aspirations of the community
- Flexibility (change function over time) – changing community expectations require facilities to be flexible and adaptable. Facilities that are responsive will be used more intensively over their lifetime
- Targeted to local needs / demands – Each community is different and changes over time. Understanding and responding to the unique and individual circumstances of the community increases the appeal of community infrastructure
- Activity generators (day / night) / active programming – Social and community infrastructure are places of action and activity. These include both passive and active forms of recreation and leisure. People are increasingly attracted to places where they can be active and experience new things and infrastructure that meets these needs will be used more intensively
- Access (disability access and transport) – Providing easy access to facilities (through both better disabled access and transport) helps to ensure that a wider range of people are attracted to and able to visit the facilities
- Visibility (highly visible location) – visible facilities are more likely to be used and are better able to compete with other forms of leisure, recreation and social infrastructure
- Safety / security (passive surveillance) – the community expects that they and their children will be safe in their own facilities. Ensuring that this is the case (and perceived to be) will maximise the possibility that these facilities are used effectively and efficiently
- Avoid duplication – Minimising duplication will ensure that resources are utilised effectively and that each facility is unique thereby offering a better and attractive product and service to the community
- Contribute to health, wellbeing and capacity – Social / community infrastructure fulfils a critically important role in serving the needs and aspirations of the community. Health and well-being are two basic needs. Maximising 'capacity' (or the potential of each person and the community as a whole) will ensure that everyone can be the best they can be
- Promote social equity – A rapidly changing economy and society has meant that the gulf between people and communities has widened in recent years. Social / community infrastructure plays an important role in

bridging this gap through a variety of means including through the establishment of networks and collaborative activity, decreasing isolation and promoting skills and education (through for example the use of the Internet and other technologies which helps to reduce the digital divide).

- Seek sustainable approaches to management, funding and maintenance (capital and operating) e.g. whole of life costs – Facilities that are sustainable in the long term are more likely to remain as key community assets and provide a better community service
- Create local competitive advantage, uniqueness and identity – Reflecting and serving the local community is important in an age where competitive advantage, uniqueness and identity are increasingly found in local things and where regions and areas compete globally for knowledge, resources and workers. Dynamic and responsive community / social infrastructure can help set a local community apart and provide new opportunities at a state, national and international level.

5.4 Community Infrastructure Standards

In order to assess the demand for community infrastructure in the area MacroPlan has developed community infrastructure standards that take into consideration:

- Community infrastructure standards from the Development Code produced by the GCC (October 2006). The standards relate a range of community infrastructure facilities to the current and emerging population
- Demand / population projections (also using specific groups where required, for example 70+ cohorts or children aged 0-4) in the precinct
- Estimates of current and future supply of community /social infrastructure within a 5km or 10km catchment and
- Previous lessons and experience in community infrastructure.

It is noted that the demand / supply balance uses different catchments (with the supply catchment covering a larger area). Hence, care must be taken in interpreting the results as the number of facilities provided by the economic model (the balance between supply and demand) must take into account possible usage and travel patterns (which will be determined in part by distance and the nature of the facility). For example, some residents may consider facilities 5km too far. Hence, this may require a smaller facility closer to a local population. This is most evident in the provision of public open space where a small neighbourhood park can meet local needs within a 500m radius, while a regional park will attract users from larger distances.

The table overleaf outlines the specific number of community facilities that would be required to cater to the proposed population of the Shell Cove Boat Harbour development alone. When considered in conjunction with the boarder area, key recommendations can be developed for the subject site.

The following table highlights the community infrastructure requirements as determined by simple provision ratios. As can be seen, due to the size of the development, there are limited requirements when only considering the development site that include:

- 2 – 3 large scale RACFs
- 1 high school
- 1 community health facility
- 2 – 3 local community centres and 1 district community centre
- 8.04 ha of open space that includes 1 – 2 neighbourhood parks

GCC Community Infrastructure Standards

Type of facility	Number Required*	Benchmark	Size
Education			
Public Primary Schools	0	1:1,500 new dwellings (approx.)	3 ha / 2.3 ha (if joint use)
Public High Schools	1	1:4,500 new dwellings (approx.)	6-10 ha
Tertiary	0		
Health and Social Welfare			
Community Health Centre	1	1:20,000 people	2,000 sqm (for 80,000 people)
Hospital	0	2 beds: 1000 people	
Residential Aged Care	2 - 3 large scale RACFs 200 – 300 places	1:10,000 (centre) 88 beds: 1,000 people 70 + years	
Youth Centres	0	1:20,000 people	
Community Service Centre	0	1:20,000 people	
Childcare facility	0	1 place: 5 children 0-4 years	
After school care facility	0	1 place: 25 children 5-12 years	
Culture			
Branch Library	0	1:33,000 people	2,400 sqm
District Library	0	1:40,000 people	2,400 sqm
Performing Arts / Cultural Centre	0	1:30,000 people	0.24 ha – 8 ha
Emergency Services			
Ambulance	0		To accommodate 12 ambulances
Fire Station	0		2,000 sqm min
Police Station	0		4,000 sqm (for first 10 years)
Community Centres			
Local	2 - 3 centres	1:6,000 people	1,500-2,400 sqm
District	1 centres	1:20,000 people	2,000-2,500 sqm

Source: Growth Centres Commission (2006) * Will be further refined through Precinct planning. May be refined through specific studies.

GCC Community Open Space Standards

Open Space and Recreation			
Overall Open Space	8.04 ha	2:83 ha: 1,000 people	
Neighbourhood Open Space	1 - 2	1:2,000 people	1 ha
Local Open Space	0	1:10,000 people	2 ha
District Open Space	0	1:100,000 people	5 ha
Local Sports Ground	0	1:10,000 people	1 ha
District Sports Ground	0	1:30,000 people	2 ha
Regional Sports Ground	0	1:200,000 people	5 ha
Local Tennis Centre	0	1:10,000 people	1 ha
District Tennis Centre	0	1:30,000 people	1 ha
Equestrian	0	1:30,000 people	2 ha
Lawn Bowls	0	1:30,000 people	1 ha
Netball / Basketball Local	0	1:10,000 people	1 ha
Netball / Basketball District	0	1:30,000 people	2 ha
District Aquatic Centre	0	1:100,000 people	1 ha
Regional Aquatic / Indoor Sports Centre	0	1:300,000 people	2 ha

Source: Growth Centres Commission (2006)

Section 6: Current Supply and Opportunity Assessment

6.1 Overview

This section discusses the required social infrastructure in the precinct.

6.2 Methodology

The requirement for additional social infrastructure has been based on an economic model which seeks to understand the balance between:

- Demand / population projections (using specific groups where required, for example 70+ or children aged 0-4) in the precinct and
- Estimates of current and future supply of community /social infrastructure within a 5km or 10km catchment.

In addition, a range of other qualitative and quantitative factors are utilised to understand the nature, type and product requirement for social / community infrastructure.

We note that the proponent, Frasers Property Group, seeks for modification to the Shell Cove Boat Harbour Concept Plan Approval under Section 75W of the Environmental Planning and Assessment Act 1979. The design as proposed has been modified since, therefore we reassessed the potential social infrastructure impacts of the Shell Cove development.

Summary table – MacroPlan SIA 2008 & MacroPlan SIA 2017

2008 Assessment	2017 Assessment
<ul style="list-style-type: none">• A primary school• 6 hospital beds• High and low aged care facilities• Child and afterschool care• 8.49ha of open space that includes 1 – 2 neighbourhood parks	<ul style="list-style-type: none">• 2 – 3 large scale RACFs• 1 community health facility• 2 – 3 local community centres and 1 district community centre• 8.04 ha of open space that includes 1 – 2 neighbourhood parks

Source: MacroPlan (2017)

6.3 Scope of Community/ Supply Facility

The following facilities (consistent with the GCC Development Code) have been considered and assessed:

- Primary Schools
- High Schools
- Tertiary
- Health and Social Welfare
- Community Health Centre
- Hospital
- Aged Care Housing
- High Care (Nursing home)
- Low Care places (Hostel)
- Youth Centres
- Community Service Centre
- Childcare facility
- After school care facility
- Culture
- Branch Library
- District Library
- Performing Arts / Cultural Centre
- Emergency Services
- Ambulance
- Fire Station
- Police Station
- Community Centres
- Local District
- Open Space and Recreation

In many cases opportunities for integration and collocation have been recognised. This ensures that one facility with multiple functions can be used for a variety of functions.

6.4 Emergency Infrastructure

6.4.1 NSW Fire Stations Current and Future Supply

There are currently 2 fire stations located in the 5km catchment radius and 3 located in 5-10km catchment radius.

Recommendation

From 2008 to now there has been a 67% increase in numbers of NSW Fire Stations, reflecting the increasing demand for Fire Services arising from the recent residential development.

*In our view, there is **adequate** supply of fire stations in the catchment radius. However, further consultation will need to occur with appropriate authorities for provision in the future as growth occurs.*

6.4.2 NSW Ambulance Service Current and Future Supply

There is currently 1 ambulance service located in the 5km catchment radius and 1 located in 5-10km catchment radius.

Recommendation

From 2008 to now there has been a 100% increase in numbers of NSW Ambulance Stations, reflecting the increasing demand for ambulance services arising from the recent residential development, particularly the Dapto and Calderwood regions.

*There is likely to be an **adequate** supply of ambulance stations in the catchment radius, further consultation will need to occur with appropriate authorities for provision in the future as growth occurs.*

6.4.3 NSW Police Service Current and Future Supply

There are currently 1 police service located in the 5km catchment radius and 2 located in 5-10km catchment radius.

Recommendation

From 2008 to now there has been a 200% increase in numbers of NSW Police Stations, reflecting the increasing demand for Police Service arising from the recent residential development.

*In our view, there is **adequate** supply of police stations in the catchment radius. However, further consultation will need to occur with appropriate authorities for provision in the future as growth occurs.*

6.5 Primary and Secondary School Infrastructure

6.5.1 Primary School Current and Future Supply

There are currently 16 primary schools located in the 5km catchment radius and 11 located in 5-10km catchment radius. The large number of primary schools is likely due the high levels of young families in the catchment area.

Shell Cove Public School is the local Primary School, which is the closest to the subject site within Shell Cove. Shell Cove Public School offers multiple outdoor play areas including a basketball court, playground and expansive grassed areas.

Primary Schools					
	As is				
	2016	2021	2026	2031	2036
Supply (0-5kms)	16	16	16	16	16
Supply (5-10kms)	11	11	11	11	11
Supply (total)	27	27	27	27	27
Required (1:1,500 new dwellings)	21.7	23.6	25.5	27.3	29.2
Surplus/Shortage	5.3	3.4	1.5	0.0	-2.2
	With additional dwellings				
	2016	2021	2026	2031	2036
Supply (0-5kms)	16	16	16	16	16
Supply (5-10kms)	11	11	11	11	11
Supply (total)	27	27	27	27	27
Required (1:1,500 new dwellings)	21.7	23.7	25.6	27.4	29.2
Surplus/Shortage	5.3	3.3	1.4	0.0	-2.2

*with higher maximum number of dwelling from 1,238 to 1,556

Recommendation

From 2008 to now there has been a 29% increase in numbers of primary schools, reflecting the increasing demand for primary schools arising from the recent residential development.

*In our view, there is **adequate** supply of primary schools in the catchment radius. According to our assessment, there is an already high level of supply of primary schools in the area.*

The development site will not require a primary school according to MacroPlan's community infrastructure standards.

6.5.2 Secondary School Current and Future Supply

There are currently 4 secondary schools located in the 5km catchment radius and 4 located in 5-10km catchment radius. **Shellharbour Anglican College** is located across the road from the western entrance of Shell Cove.

High Schools					
	As is				
	2016	2021	2026	2031	2036
Supply (0-5kms)	4	4	4	4	4
Supply (5-10kms)	4	4	4	4	4
Supply (total)	8	8	8	8	8
Required (1:4,500 new dwellings)	7.2	7.9	8.5	9.1	9.7
Surplus/Shortage	0.8	0.1	-0.5	-1.1	-1.7
	With additional dwellings				
	2016	2021	2026	2031	2036
Supply (0-5kms)	4	4	4	4	4
Supply (5-10kms)	4	4	4	4	4
Supply (total)	8	8	8	8	8
Required (1:4,500 new dwellings)	7.2	7.9	8.5	9.1	9.7
Surplus/Shortage	0.8	0.1	-0.5	-1.1	-1.7

*with higher maximum number of dwelling from 1,238 to 1,556

Recommendation

From 2008 to now there has been a 33% increase in numbers of high schools, reflecting the increasing demand for high schools arising from the recent residential development.

*In our view, there is currently **adequate** supply of high schools in the catchment radius. According to our assessment, there is an already high level of supply of high schools in the area to 2026.*

However, the Boat Harbour development will contribute to catchment demand for an additional high school (anecdotally about 20-30%). According to our

assessment, one high school might be needed in the long term (2026 onwards) but further consultation will need to occur with appropriate authorities for provision in the future as growth occurs.

MacroPlan recommends no less than 6,000 m² should be allocated for one high school at the subject site.

*We also note that there are 4 secondary schools located in the 5km catchment radius, particularly **Shellharbour Anglican College** is located across the road from the western entrance of Shell Cove. Further assessment on the current capacity, demand and potential to redevelop the area's existing high schools first.*

6.6 Community Health Facility

6.6.1 Current and Future Supply

There are currently 0 Community Health Facilities located in the 5km catchment radius and 1 located in 5-10km catchment radius.

Community Health Facilities					
	As is				
	2016	2021	2026	2031	2036
Supply (0-5kms)	1	1	1	1	1
Supply (5-10kms)	0	0	0	0	0
Supply (total)	1	1	1	1	1
Required (1:20,000 people)	4.2	4.5	4.8	5.1	5.3
Surplus/Shortage	-3.2	-3.5	-3.8	-4.1	-4.3
	With additional dwellings				
	2016	2021	2026	2031	2036
Supply (0-5kms)	1	1	1	1	1
Supply (5-10kms)	0	0	0	0	0
Supply (total)	1	1	1	1	1
Required (1:20,000 people)	4.2	4.5	4.8	5.1	5.4
Surplus/Shortage	-3.2	-3.5	-3.8	-4.1	-4.4

*with higher maximum number of dwelling from 1,238 to 1,556

We also do note that a development recently commenced for a single community health centre at the former Kiama Hospital site; however, there is no further information available just yet (anticipated to occur in early 2017).

Recommendation

*According to MacroPlan's community infrastructure standards, **there will be a need for additional community health facilities** to be incorporated into the development.*

Although provision ratios demonstrate a strong need for community health facilities in the 10km catchment radius, this demand should be met within other local areas in the catchment radius by the relevant authorities and other facilities (e.g. Shellharbour private and public hospitals etc).

The Shell Harbour Boat Harbour Concept Plan should include one (1) community health facility of some 2,000 m².

In our view, the new community health facility at Shell Cove Boat Harbour should provide integrated general practice and community health services, which will service the identified 10km radius area, providing a range of district level facilities covering:

- *Counselling*
- *Primary Health Nursing*
- *Diabetes Educator*
- *Diabetes Dietician*
- *Podiatry*
- *Eating Disorders Dietician*
- *Heart Failure*
- *Paediatric Audio*
- *Palliative Care Volunteer Coordinator*
- *Palliative Care Counsellor*
- *Parkinson's Nurse*
- *Stoma Nurse*
- *Women's Health*

6.7 Regional Health Facilities

6.7.1 Current and Future Supply

There are currently 2 hospitals located in the 5km catchment radius and 1 located in 5-10km catchment radius.

Regional Health Facility (Supply of Beds)					
	As is				
	2016	2021	2026	2031	2036
Supply (0-5kms)	242	242	242	242	242
Supply (5-10kms)	20	20	20	20	20
Supply (total)	262	262	262	262	262
Required (2 beds per 1000 people)	168.6	180.1	191.6	202.1	212.9
Surplus/Shortage	93.4	81.9	70.4	59.9	49.1
	With additional dwellings				
	2016	2021	2026	2031	2036
Supply (0-5kms)	242	242	242	242	242
Supply (5-10kms)	20	20	20	20	20
Supply (total)	262	262	262	262	262
Required (2 beds per 1000 people)	168.6	180.6	192.7	203.7	214.5
Surplus/Shortage	93.4	81.4	69.3	58.3	47.5

*with higher maximum number of dwelling from 1,238 to 1,556

Recommendation

From 2008 to now there has been a 64% increase in numbers of hospital beds, reflecting the increasing demand for regional health facilities arising from the recent residential development.

*In our view, there is already a **sufficient** supply of current regional health facilities to accommodate growth demand from the subject site, associated with the proposed higher number of dwellings.*

6.8 Residential Aged Care Places

Since July 2014, the distinction between high and low care in residential aged care was removed for all new and existing residents³. The approval for permanent residential aged care is not limited to a care level, but instead, approved on an 'ageing in place' basis.

There are currently 2 existing aged care facility located in the 5km catchment radius and 4 located in 5-10km catchment radius. Subsequently we have derived a total of 622 aged care residential places.

An examination of projects listed on Cordell Connect has revealed there are six (6) RACF projects in the pipeline to 2021, 3 aged care facilities will be located in the 5km catchment radius and 3 will be located in 5-10km catchment radius. Collectively, the pipeline provides for development of 578 aged care places.

Aged Care (Supply of Care Places)					
	As is				
	2016	2021	2026	2031	2036
Supply (0-5kms)	200	441	441	441	441
Supply (5-10kms)	422	759	759	759	759
Supply (total)	622	1,200	1,200	1,200	1,200
Required (88 beds per 1000 people)	877.3	1,072.8	1,302.6	1,553.1	1,796.9
Surplus/Shortage	-255.3	127.2	-102.6	-353.1	-596.9
	With additional dwellings				
	2016	2021	2026	2031	2036
Supply (0-5kms)	200	441	441	441	441
Supply (5-10kms)	422	759	759	759	759
Supply (total)	622	1,200	1,200	1,200	1,200
Required (88 beds per 1000 people)	877.3	1,082.3	1,322.9	1,585.6	1,829.4
Surplus/Shortage	-255.3	117.7	-122.9	-385.6	-629.4

*with higher maximum number of dwelling from 1,238 to 1,556

Recommendation

From 2008 to now there has been a 91% increase in numbers of residential aged care places (combined High and Low care places), reflecting the increasing demand for aged care services and the rapidly ageing population profile in the region.

In our view, there is already a sufficient level of supply of residential aged care facilities

³ Department of Veterans' Affairs

in the catchment with the potential six (6) new aged care facilities in the pipeline to year 2021. **However, two or three large-scale residential aged care facilities might need to be constructed in the long term (2026 onwards)** but the private sector could meet this demand. Government should facilitate private investment in the catchment area.

We note that the Commonwealth Government is shifting its funding focus from RACF to home care packages. This shift in policy will be an increasingly important feature of service deliver over time. The new policy environment suggests the projection of a service shortage by 2026.

Moreover, home care packages can be delivered more efficiently when retirees are colocated. This outcome is more likely at the subject site, due to the predominance of apartments.

6.9 Youth Centres

6.9.1 Current and Future Supply

There are currently 4 youth centres in the 5km and 2 located in the 5-10km catchment radius.

Youth Centres					
	As is				
	2016	2021	2026	2031	2036
Supply (0-5kms)	1	1	1	1	1
Supply (5-10kms)	2	2	2	2	2
Supply (total)	6	6	6	6	6
Required (1:20,000 people)	4.2	4.5	4.8	5.1	5.3
Surplus/Shortage	1.8	1.5	1.2	0.9	0.7
	With additional dwellings				
	2016	2021	2026	2031	2036
Supply (0-5kms)	1	1	1	1	1
Supply (5-10kms)	2	2	2	2	2
Supply (total)	6	6	6	6	6
Required (1:20,000 people)	4.2	4.5	4.8	5.1	5.4
Surplus/Shortage	1.8	1.5	1.2	0.9	0.6

*with higher maximum number of dwelling from 1,238 to 1,556

Recommendation

From 2008 to now there has been a 200% increase in numbers of youth centres, reflecting the increasing demand for such facilities and services arising from the recent residential development.

*According to MacroPlan's community infrastructure standards, **there will not be a need for additional youth centre(s)** to be incorporated into the development site. In our view, there is already a good level of supply of current regional health facilities.*

6.10 Community Centre

6.10.1 Community Service Centre

There are currently 2 community services centres in the 5km and 0 located in the 5-10km catchment radius.

Community Service Centre					
	As is				
	2016	2021	2026	2031	2036
Supply (0-5kms)	2	2	2	2	2
Supply (5-10kms)	0	0	0	0	0
Supply (total)	2	2	2	2	2
Required (1:20,000 people)	1.4	1.5	1.6	1.7	1.8
Surplus/Shortage	0.6	0.5	0.4	0.3	0.2
	With additional dwellings				
	2016	2021	2026	2031	2036
Supply (0-5kms)	2	2	2	2	2
Supply (5-10kms)	0	0	0	0	0
Supply (total)	2.0	2.0	2.0	2.0	2.0
Required (1:20,000 people)	1.4	1.5	1.6	1.7	1.8
Surplus/Shortage	0.6	0.5	0.4	0.3	0.2

*with higher maximum number of dwelling from 1,238 to 1,556

Recommendation

From 2008 to now there has been a 100% increase in numbers of community service centre, reflecting the increasing demand for community service arising.

In our view, there is adequate supply of community service centres within the catchment area.

6.10.2 Local & District Community Centre

There are currently 3 local community centres in the 5km and 4 located in the 5-10km catchment radius.

Community Centre (Local)					
<i>As is</i>					
	2016	2021	2026	2031	2036
Supply (0-5kms)	3	3	3	3	3
Supply (5-10kms)	4	4	4	4	4
Supply (total)	7	7	7	7	7
Required (1:6,000 people)	14.1	15.0	16.0	16.8	17.7
Surplus/Shortage	-7.1	-8.0	-9.0	-9.8	-10.7
<i>With additional dwellings</i>					
	2016	2021	2026	2031	2036
Supply (0-5kms)	3	3	3	3	3
Supply (5-10kms)	4	4	4	4	4
Supply (total)	7	7	7	7	7
Required (1:6,000 people)	14.1	15.1	16.1	17.0	17.9
Surplus/Shortage	-7.1	-8.1	-9.1	-10.0	-10.9

*with higher maximum number of dwelling from 1,238 to 1,556

There are currently 1 district community centres in the 5km and 0 located in the 10km catchment radius.

Community Centre (District)					
<i>As is</i>					
	2016	2021	2026	2031	2036
Supply (0-5kms)	1	1	1	1	1
Supply (5-10kms)	0	0	0	0	0
Supply (total)	1	1	1	1	1
Required (1:20,000 people)	4.0	4.2	4.5	4.8	5.1
Surplus/Shortage	-3.0	-3.2	-3.5	-3.8	-4.1
<i>With additional dwellings</i>					
	2016	2021	2026	2031	2036
Supply (0-5kms)	1	20,000	20,000	20,000	20,000
Supply (5-10kms)	0	5	5	5	5
Supply (total)	1	1	1	1	1
Required (1:20,000 people)	4.0	4.2	4.5	4.8	5.1
Surplus/Shortage	-3.0	-3.2	-3.5	-3.8	-4.1

*with higher maximum number of dwelling from 1,238 to 1,556

Recommendation:

From 2008 to now there has been a 130% increase in numbers of local community centre, reflecting the increasing demand for local community centres arising. There has been no change in numbers of district community centre since 2008.

However, there is still inadequate supply of local community centres within the catchment area. According to provision ratios there will be urgent needs for local community centres within the development site.

Furthermore, there is the opportunity for Shell Cove to become a district community centre to cater to undersupply within the catchment area. According to provision ratios there will be a need for more district community centre(s) within the Shell Cove and the surrounding regions.

6.11 Child Care Facility

6.11.1 Definitions

It should be noted that the GCC standards consider two types of child care facilities:

- Childcare facility and
- After school care facility.

This report considers only the first type and assumes that pre-school care, family day care and long day care all serve the purpose of child care.

6.11.2 Current and Future Supply

There are currently 29 childcare facilities located in the 5km catchment radius and 25 located in 10km catchment radius. Subsequently we have derived a total of 1,155 places.

An examination of projects listed on Cordell Connect has revealed there are five (5) new childcare facility projects in the pipeline to 2021, 4 facilities will be located in the 5km catchment radius and 1 will be located in 5-10km catchment radius. Collectively, the pipeline provides for development of a further 405 places.

Child Care Facility (Places)					
As is					
	2016	2021	2026	2031	2036
Supply (0-5kms)	1,155	1,521	1,521	1,521	1,521
Supply (5-10kms)	0	39	39	39	39
Supply (total)	1,155	1,560	1,560	1,560	1,560
Required (1 per every 5 children)	1,067.7	1,124.9	1,129.7	1,113.2	1,135.4
Surplus/Shortage	87.3	435.1	430.3	446.8	424.6
With additional dwellings					
	2016	2021	2026	2031	2036
Supply (0-5kms)	1,155	1,521	1,521	1,521	1,521
Supply (5-10kms)	0	39	39	39	39
Supply (total)	1,155	1,560	1,560	1,560	1,560
Required (1 per every 5 children)	1,067.7	1,134.8	1,149.0	1,141.3	1,163.5
Surplus/Shortage	87.3	425.2	411.0	418.7	396.5

*with higher maximum number of dwelling from 1,238 to 1,556

Recommendation

From 2008 to now there has been a 78% increase in numbers of child care places, reflecting the increasing demand due to more young families living in the region.

In our view, there is adequate supply of such services within the catchment area. According to MacroPlan's community infrastructure standards, there will not be a need for additional childcare facility to be incorporated into the development site.

Moreover, there are currently 2 After-School care facilities located in the 5km catchment radius and 1 located in 10km catchment radius. Subsequently we have derived a total of 135 places.

After School Care Facility (Places)					
	As is				
	2016	2021	2026	2031	2036
Supply (0-5kms)	105	105	105	105	105
Supply (5-10kms)	30	30	30	30	30
Supply (total)	135	135	135	135	135
Required (1 per 25 children, 5-12 yo)	230.4	241.6	256.4	260.5	259.4
Surplus/Shortage	-95.4	-106.6	-121.4	-125.5	-124.4
	With additional dwellings				
	2016	2021	2026	2031	2036
Supply (0-5kms)	105	105	105	105	105
Supply (5-10kms)	30	30	30	30	30
Supply (total)	135	135	135	135	135
Required (1 per 25 children, 5-12 yo)	230.4	243.8	260.7	266.8	265.7
Surplus/Shortage	-95.4	-108.8	-125.7	-131.8	-130.7

*with higher maximum number of dwelling from 1,238 to 1,556

Recommendation

From 2008 to now there has been a 128% increase in numbers of after-school care places, reflecting the increasing demand due to more young families living in the region.

*Although there is identified need for after school facilities to be constructed in the short term within the 10km catchment radius, **the existing arrangement at Shell Cove Primary School for after school care will meet this identified need within the development site.***

6.12 Library

6.12.1 Current and Future Supply

There are currently 2 branch libraries located in the 5km catchment radius and 3 located in 10km catchment radius.

An examination of projects listed on Cordell Connect has revealed there are two (2) new libraries in the pipeline to 2021, and they will be located in the 5km catchment radius.

Library (Branch)					
As is					
	2016	2021	2026	2031	2036
Supply (0-5kms)	2	4	4	4	4
Supply (5-10kms)	3	3	3	3	3
Supply (total)	5	7	7	7	7
Required	2.6	2.7	2.9	3.1	3.2
Surplus/Shortage	2.4	4.3	4.1	3.9	3.8
With additional dwellings					
	2016	2021	2026	2031	2036
Supply (0-5kms)	2	4	4	4	4
Supply (5-10kms)	3	3	3	3	3
Supply (total)	5	7	7	7	7
Required	2.6	2.7	2.9	3.1	3.2
Surplus/Shortage	2.4	4.3	4.1	3.9	3.8

*with higher maximum number of dwelling from 1,238 to 1,556

Recommendation

From 2008 to now there has been a 25% increase in numbers of library, reflecting the increasing demand due to more population living in the region.

*There are **adequate** levels of library services within the catchment area.*

6.13 Performing Arts/ Cultural Centre

6.13.1 Current and Future Supply

There is currently 1 museum / cultural centre located in the 5km catchment radius and 4 located in 10km catchment radius.

Performing Arts/Cultural					
	As is				
	2016	2021	2026	2031	2036
Supply (0-5kms)	1	1	1	1	1
Supply (5-10kms)	4	4	4	4	4
Supply (total)	5	6	6	6	6
Required	2.8	3.0	3.2	3.4	3.5
Surplus/Shortage	2.2	3.0	2.8	2.6	2.5
	With additional dwellings				
	2016	2021	2026	2031	2036
Supply (0-5kms)	1	1	1	1	1
Supply (5-10kms)	4	4	4	4	4
Supply (total)	5	6	6	6	6
Required	2.8	3.0	3.2	3.4	3.6
Surplus/Shortage	2.2	3.0	2.8	2.6	2.4

*with higher maximum number of dwelling from 1,238 to 1,556

Recommendation

From 2008 to now there has been a 200% increase in numbers of such facilities, reflecting the increasing demand due to more population living in the region.

*There is **adequate** supply of performing arts / cultural facilities in the catchment area.*

6.14 Tertiary Facilities

6.14.1 Current and Future Supply

There is currently 1 tertiary facility located in the 5km catchment radius and 0 located in 10km catchment radius.

Recommendation

There are adequate supplies of tertiary facilities in the catchment area.

6.15 Open Space and Recreation Supply Assessment

6.15.1 Current Supply

Open Space has been identified as:

- Neighbourhood Open Space – neighbourhood park that services a small population catchment of up to 2,000. Local amenity can include a small playground and seating. Size can range from a house block to 0.5ha.
- Local Open Space – local park that services a medium population of up to 10,000. Local amenity can include a medium sized playground, seating, rubbish bin and local sports ground. Size should be around 2ha.

There are currently 39 neighbourhood reserves located in the 5km catchment radius and 43 located in 10km catchment radius (including 4 Neighbourhood parks developed to date within Shell Cove).

There are currently 25 local reserves located in the 5km catchment radius and 13 located in 10km catchment radius (including one large reserve within Shell Cove providing a half basketball court, cricket pitch, minis soccer field, picnic areas and playground).

There are currently 10 local sporting grounds located in the 5km catchment radius and 17 located in 10km catchment radius.

There are also 4 lawn bowls located in 10km catchment radius.

6.15.2 Open Space Future Supply

Any provision of open space should be equitable across the area. In general, all residents should be within 400m of usable open space, which could include local parks, sports grounds, linear connection or accessible natural areas.

Recommendation

8.04 ha of useable open space will need to be set aside in the development site. This should include at least one and potentially two local parks that incorporate playground and passive play areas. The remainder can be made up of foreshore, bushwalking or bike riding areas.

Shell Cove Boat Harbour Precinct's current and future open space provision will exceed this recommended area.

6.15.3 Recreation Facilities Future Supply

Neighbourhood Open Space					
Supply (total)	82	82	82	82	82
As is					
Required	42.2	45.0	47.9	50.5	53.2
Surplus/Shortage	39.8	37.0	34.1	31.5	28.8
With additional dwellings					
Required	42.2	45.2	48.2	50.9	53.6
Surplus/Shortage	39.8	36.8	33.8	31.1	28.4
Local Open Space					
Supply (total)	38	38	38	38	38
As is					
Required	8.4	9.0	9.6	10.1	10.6
Surplus/Shortage	29.6	29.0	28.4	27.9	27.4
With additional dwellings					
Required	8.4	9.0	9.6	10.2	10.7
Surplus/Shortage	29.6	29.0	28.4	27.8	27.3
Local Sports Ground					
Supply (total)	27	27	27	27	27
As is					
Required	8.4	9.0	9.6	10.1	10.6
Surplus/Shortage	18.6	18.0	17.4	16.9	16.4
With additional dwellings					
Required	8.4	9.0	9.6	10.2	10.7
Surplus/Shortage	18.6	18.0	17.4	16.8	16.3
Local Tennis Facility					
Supply (total)	11	11	11	11	11
As is					
Required	8.4	9.0	9.6	10.1	10.6
Surplus/Shortage	2.6	2.0	1.4	0.9	0.4
With additional dwellings					
Required	8.4	9.0	9.6	10.2	10.7
Surplus/Shortage	2.6	2.0	1.4	0.8	0.3
Lawn Bowls					
Supply (total)	4	4	4	4	4
As is					
Required	2.8	3.0	3.2	3.4	3.5
Surplus/Shortage	1.2	1.0	0.8	0.6	0.5
With additional dwellings					
Required	2.8	3.0	3.2	3.4	3.6
Surplus/Shortage	1.2	1.0	0.8	0.6	0.4

*with higher maximum number of dwelling from 1,238 to 1,556

Recommendation

From 2008 to now there have been significant increases in numbers of the aforementioned open spaces and facilities, reflecting the increasing demand due to more population living in the region.

In our view, there are currently good levels of supply of sport and recreation amenity in the catchment area. Provision ratios suggest that there is no need to fill in any gap.

Further consideration should be given to the alternative land uses rather than additional recreation facility provision – for example, hotel and serviced apartments.

6.15.4 Aquatic Facilities

There are currently 2 district aquatic centres located in the 5km catchment radius and 1 located in 10km catchment radius.

Moreover, there are currently 3 regional aquatic centres located in the 5km catchment radius and 1 located in 10km catchment radius.

District Aquatic Centre					
	As is				
	2016	2021	2026	2031	2036
Supply (0-5kms)	2	2	2	2	2
Supply (5-10kms)	1	1	1	1	1
Supply (total)	3	3	3	3	3
Required	0.8	0.9	1.0	1.0	1.1
Surplus/Shortage	2.2	2.1	2.0	2.0	1.9
	With additional dwellings				
	2016	2021	2026	2031	2036
Supply (0-5kms)	2	2	2	2	2
Supply (5-10kms)	1	1	1	1	1
Supply (total)	3	3	3	3	3
Required	0.8	0.9	1.0	1.0	1.1
Surplus/Shortage	2.2	2.1	2.0	2.0	1.9

*with higher maximum number of dwelling from 1,238 to 1,556

Regional Aquatic/Indoor Sports Centre					
	As is				
	2016	2021	2026	2031	2036
Supply (0-5kms)	1	2	2	2	2
Supply (5-10kms)	2	2	2	2	2
Supply (total)	3	4	4	4	4
Required	0.3	0.3	0.3	0.3	0.4
Surplus/Shortage	2.7	3.7	3.7	3.7	3.6
	With additional dwellings				
	2016	2021	2026	2031	2036
Supply (0-5kms)	1	2	2	2	2
Supply (5-10kms)	2	2	2	2	2
Supply (total)	3	4	4	4	4
Required	0.3	0.3	0.3	0.3	0.4
Surplus/Shortage	2.7	3.7	3.7	3.7	3.6

*with higher maximum number of dwelling from 1,238 to 1,556

Recommendation

There is currently adequate supply of aquatic facilities in the catchment area.