

#### Attachment 3 – Statement of Requirements

# Locality Site Viability Technical Support and High Street Regeneration and Social Infrastructure Support Contract Reference: CPD 004 118 172

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### 1. PURPOSE

- 1.1 The purpose of this variation is to introduce:
  - a new technical support offer which will help communities to bring forward development at sites with a range of viability, including sites that are less viable particularly, and;
  - a new combined technical support and grant offer to aid communities seeking to bring forward high street regeneration or social/community infrastructure.

## 2. BACKGROUND TO THE CONTRACTING AUTHORITY

2.1 The Ministry for Housing, Communities and Local Government's (MHCLG's) role is to provide the legislative and policy framework to enable local people to create great places to live and work, and to give more power to local people to shape what happens in their area.

## 3. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT

- 3.1 Neighbourhood planning gives communities in England direct power to develop a shared vision for their neighbourhood and shape the development and growth of their local area. They are able to choose where they want new homes, shops and offices to be built, have their say on what those new buildings should look like and what infrastructure should be provided, and grant planning permission for the new buildings they want to see go ahead. More information about neighbourhood planning is available the MHCLG website: on https://www.gov.uk/guidance/neighbourhood-planning--2.
- 3.2 MHCLG recognises that neighbourhood planning is primarily undertaken by volunteers and depending on local ambitions, neighbourhood planning can be complex. In this context, MHCLG has made funding and support available to community groups and their local planning authorities since 2011.
- 3.3 There is currently no funding for site viability studies for Neighbourhood Plans, except where groups intend to obtain planning permission through a Neighbourhood Development Order for discounted homes. This means any Neighbourhood Plans considering brownfield sites for redevelopment for economic or social uses would need to rely on generic, area-wide viability assumptions which may not factor in very specific neighbourhood circumstances or funding opportunities. If neighbourhood planning groups were assisted through site viability support, however, it would enable them to identify realistic proposals for site redevelopment and enhance the likelihood that sites will come forward. This could be particularly beneficial in under-represented urban and deprived areas.



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3.4 There has been an ongoing shift in how people live, work and shop which has now been accelerated by Covid-19, and towns and villages will be struggling more than ever before. For this reason, further support through the new combined technical support and grant offer to aid communities seeking to bring forward high street regeneration or social/community infrastructure is required. MHCLG is seeking to offer support to groups bringing forward schemes that will result in planning permission, or schemes that might not require planning permission, but which in both cases will either foster tangible high street regeneration or provide useful social infrastructure that offers demonstrable benefit to the community, and can be delivered in the short to medium term. Providing support for the working up of community-led proposals will help communities to reshape and redevelop their high streets and social infrastructure to suit their needs. This will help demonstrate the government's recognition of the challenges posed by these rapid changes and the importance of community-led regeneration.

## 4. **DEFINITIONS**

Expression or Acronym	Definition		
MHCLG	means Ministry of Housing, Communities and Local Government		
NDP	means Neighbourhood Development Plan		
QB	means Qualified Body – this is usually a neighbourhood planning forum or a parish/town council acting to develop a neighbourhood plan. Also referred to as 'groups'.		
HSSI	means High Street / Social Infrastructure, referring to the new combined technical support and grant offer to aid communities to bring forward high street regeneration or social/community infrastructure		
TS	means Technical Support		
NDO	means Neighbourhood Development Order		
GDS	means Government Digital Service		
CRMS	means Customer Relationship Management System		
SLA	means Service Level Agreement		



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### 5. SCOPE OF REQUIREMENT

- 5.1 In terms of the new technical support offer which will help communities to develop proposals for sites with a range of viability, including less viable sites in particular:
  - 5.1.2 The supplier must deliver screening and assessment for neighbourhood planning groups looking for support, after which the supplier shall submit requests for support to MHCLG for eligible groups.

5.2 In terms of the new combined technical support and grant offer to aid communities to bring forward high street regeneration or social/community infrastructure:

- 5.2.2 The supplier must deliver the establishment of new questions regarding eligibility for technical support and/or grant to aid communities to bring forward high street regeneration or social/community infrastructure within the existing application form completed by neighbourhood planning groups looking for support.
- 5.2.3 Once MHCLG have agreed the up to 20 QBs to receive technical support the supplier will complete the screening and assessment of the applications for technical support and submit requests for those technical support packages to MHCLG. It is the Authority's expectation that the supplier will complete these technical support facilitation packages by December 2021 ideally, subject to QB's progress or any wider external factors affecting progress.
- 5.2.4 Once the facilitation package has been completed, the supplier shall also complete the grant assessment process and submit applications for approval to MHCLG. During the grant assessment process applications will be assessed based on the information provided in the application form and drawing on the facilitation support already received. The assessment criteria will be as follows:
  - a. Is all the proposed expenditure eligible (we will reduce the total amount of grant awarded for any items of ineligible expenditure)
  - b. Is there a clear need for the project spend?



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- c. Is there evidence of how the planned activities will help you progress towards achieving high street regeneration or providing social infrastructure for a particular site?
- d. Is the project realistic and achievable (this will include initial considerations of whether the land can be acquired for the proposed purpose)?
- e. Are the project costs reasonable and do they add up?
- f. Does the project demonstrated value for money in terms of the relationship between costs and benefits?
  - All grants will be assessed by appropriately trained and experienced grant assessors and presented to MHCLG for a final decision. Grant assessment will be completed within 15 working days (excluding MHCLG's final decision making).
- 5.2.5 The supplier shall not administer the grants, this work will be completed by a separate MHCLG contractor.

#### 6. THE REQUIREMENT

- 6.1 In terms of the new technical support offer which will help communities to develop proposals for sites with a range of viability, including less viable sites in particular, the end-to-end process will be as outlined below:
  - 6.1.1 In order to determine eligibility, the supplier shall undertake:
    - A screening assessment of need and planned content to assess eligibility for Technical Support
    - A thorough diagnostic to ensure that Site Viability Support is the appropriate support package
  - 6.1.2 Once the support is approved the supplier and QB shall agree:
    - Details of a single named supporter who will be appointed to act as a critical friend, bringing technical knowledge and expertise on NDPs to the group.
    - The supporter will have access to a broad pool of technical and specialist support from across the wider partnership.
    - 6.1.3 The support provided shall allow the single named supporter to work alongside the QB to consider the following key issues on the proposed development: proposed site and its constraints and barriers, site



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acquisition and land deals, means of development, and viability and financing options.

- 6.1.4 If the QB is preparing a NDP, the links present between policy and allocations, and the timeline for the procedural process, shall also be considered.
- 6.1.5 The output of this Technical Support package shall be a report summarising the findings from the residual valuation appraisal(s). The detailed appraisals shall be included as an appendix, with the main body of the report putting forward recommendations. If the results indicate a site(s) is viable, it shall provide a basis for QBs to move forward with the development proposed, with views on how to improve deliverability if necessary. If the results indicate the proposed development is unviable, the report shall state the main influencing factors and suggest the means by which deliverability could be improved.
- 6.2 In terms of the new combined technical support and grant offer to aid communities to bring forward high street regeneration or social/community infrastructure, the end-to-end process will be as outlined below:
  - 6.2.2 The supplier shall manage the following process regarding applications for support:
    - QBs interested in the HSSI Grant will make an expression of interest which will result in them being sent a link to the TS application form (see Annex A for full form).
    - The TS application form will collect all the current information.
  - 6.2.3 MHCLG will agree which 20 QBs will receive technical support, and the supplier will conduct a diagnostic and then deliver these technical support facilitation packages. It is the Authority's expectation that the supplier will complete these technical support facilitation packages by December 2021 ideally, subject to QB's progress or any wider external factors affecting progress.
    - If support is offered via the TS Facilitation package, it will determine and assess:
      - a) If the use of the HSSI Grant is the best option (or if there are other options by which to bring infrastructure enhancement or planning permission forward),
      - b) The support that will help the QB to scope the work required.

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- The facilitation support will report on the following key issues:
  - a) Links to any NDP or NDO preparation.
  - b) The proposed enhancements.
  - c) Issues relating to viability and financing options.
- The facilitation support will help the QB to identify the key organisations (commercial, public and voluntary sector) to partner with to develop and implement their scheme.
- The facilitation support will sign post the QB to resources to support them to learn from what is going on in other areas.
- The facilitation support will determine if the QB has the intent and is likely to succeed with preparing and delivering the change. For those QBs where the facilitation support determines that preparation and/or delivery is unlikely to succeed the QB will not be invited to apply for grant funding support.
- Where the facilitation support determines that the QB is likely to succeed with both preparation and delivery, and leads to a clear project plan, the QB would be eligible for the HSSI Grant support and can apply for up to £15,000 grant support. For these QBs the facilitation support will also set out how best to use the mix of TS and grant support.
  - 6.2.4 The supplier shall manage the following process regarding applications for £15,000 HSSI Grant Support:
- The existing grant application will be amended to seek information on the following:
  - a) What funding is sought setting out what the funding will be spent on, and over what period of time
  - b) What the proposed high street or social infrastructure scheme is
  - c) Why it is believed the scheme will be successful in reinvigorating the high street and/or social infrastructure
  - d) How the scheme meets the needs of the community
  - e) What local engagement has taken place
  - f) The evidence of community support
  - g) The link with the NDP and any NDO.



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- Applications will be assessed based on the information provided in the application form and drawing on the facilitation support already received. The assessment criteria will be as follows:
- a) Is all the proposed expenditure eligible? (we will reduce the total amount of grant awarded for any items of ineligible expenditure)
- b) Is there a clear need for the project spend?
- c) Is there evidence of how the planned activities will help the group to progress towards the reinvigoration of the high street and/or social infrastructure?
- d) Is the project realistic and achievable (this will include initial considerations of whether the land or property can be acquired for the proposed purpose)?
- e) Are the project costs reasonable and do they add up?
- f) Does the project demonstrate value for money in terms of the relationship between costs and benefits?
- All grants will be assessed by appropriately trained and experienced grant assessors and presented to MHCLG for a final decision. Grant assessment will be completed in 15 working days (excluding MHCLGs final decision making).
- 6.2.3 The Supplier shall manage all aspects of the provision of the site viability support and the HSSI support in accordance with specifications in the existing contract, except for the administration of the HSSI grant which shall be managed by a separate MHCLG contractor.

## 7. KEY MILESTONES AND DELIVERABLES

7.1 The following Contract milestones/deliverables shall apply:



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Milestone/Deliverable	Description	Timeframe or Delivery Date
1	The Supplier shall work closely with the Authority to devise robust criteria, which are then agreed with the Authority, against which all applications for HSSI grant can be assessed and successful applications awarded	by 30 <sup>th</sup> June 2021

#### 8. VOLUMES

- 8.1 In terms of the new technical support offer, which will help communities to develop proposals for sites with a range of viability, including less viable sites in particular, the budget of £408,740 including implementation costs will allow the supplier to support 20 groups on a first come first served basis. It is likely that this package will be over-subscribed.
- 8.2 In terms of the new combined technical support and grant offer to aid communities to bring forward high street regeneration or social/community infrastructure, given the issues faced by many high streets it is anticipated there will be a high level of demand for support, likely around 50 groups. However, the budget of £410,220 including implementation costs will allow the supplier to support 20 QBs.

## 9. CONTINUOUS IMPROVEMENT

- 9.1 The Supplier will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.
- 9.2 The Supplier should present new ways of working to the Authority during monthly Contract review meetings.
- 9.3 Changes to the way in which the Services are to be delivered must be brought to the Authority's attention and agreed prior to any changes being implemented.

#### 10. PRICE

10.1 MHCLG have allocated a budget for £408,740 for the Site Viability Technical Support, and a further £410,220 for the combined technical support and grant offer to aid communities to bring forward high street regeneration or social/community infrastructure.



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- 10.2 Implementation costs associated with both streams of support (Site Viability Support Costs Stream 1, and High Street Regeneration and Social Infrastructure Support Stream 2) total £18,960 which is being met in its entirety from the existing budget.
- 10.3 The £400,000 of costs associated with Site Viability Support are also being met from the existing budget.
- 10.4 Given this, the only cost that this amendment relates to is the £400,000 associated with the High Street Regeneration and Social Infrastructure Support.
- 10.5 Prices are to be submitted via the e-Sourcing Suite [Attachment 4 Price Schedule] including VAT and including all other expenses relating to Contract delivery.

## 11. STAFF AND CUSTOMER SERVICE

- 11.1 The Supplier shall provide a sufficient level of resource throughout the duration of the Contract in order to consistently deliver a quality service.
- 11.2 The Supplier's staff assigned to the Contract shall have the relevant qualifications and experience to deliver the Contract to the required standard.
- 11.3 The Supplier shall ensure that staff understand the Authority's vision and objectives and will provide excellent customer service to the Authority throughout the duration of the Contract.

#### 12. SERVICE LEVELS AND PERFORMANCE

12.1 The Authority will measure the quality of the Supplier's delivery by:

KPI/SLA	Service Area	KPI/SLA description
1	Grant Assessments	Assessment is made and sent to MHCLG where appropriate, within a maximum of 15 (fifteen) Working Days from receipt of a fully completed application.  Decision communicated to the Grant Administrator within 1 (one) Working Day of the decision being made
2	Communications with MHCLG, its agents, GDS and the Grant Administrator	Communications are responded to in writing within 1 (one) Working Day.



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3	Customer Enquiries	All Customer enquiries are immediately logged on the CRMS and responded to within 2 (two) Working Days of receipt.
4	Technical Support Delivery	Delivery of Technical Support packages are completed within the specified timescales agreed between the Contractor and MHCLG.
5	Customer Satisfaction (including complaint handling)	Mean score for customer feedback through the advice service to be monitored and reported on by the Contractor.

In addition to the KPIs set out above, the Authority will also seek for the monthly and quarterly reports provided by the Supplier to provide details on the following measures relating to site viability support and HSSI support, in order to be satisfied that the benefits sought from both streams of support are being realised:

## Site Viability Support

Within the Supplier's reporting on site viability support the Authority will be seeking details on:

- the number of applications for site viability support, and the number of technical support packages that are awarded and completed
- the number of sites brought forward/under consideration as a direct result of site viability support. This figure (or range of figures) on output will be sought as an estimate in advance of year end (March 2022) to assist the Authority to evaluate the overall success of the support.
- High Street Regeneration and Social Infrastructure Support
  Within the Supplier's reporting on HSSI support the Authority will be
  seeking details on:
  - the number of technical support packages and grants awarded
  - the number of planning permissions in progress as a direct result of support provided (NB as in many instances it is likely to take more than 12 months for groups to submit a planning application following receipt of HSSI support the Authority will not be measuring submission or approvals of planning permissions – just progress towards this)



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- the number of buildings/facilities likely to be redeveloped as a direct result of support (this figure, or range of figures, will be sought as an estimate)
- 12.1 The Contractor shall have an exit strategy and plan detailing timescales and handover activities to ensure a successful exit and transition back to MHCLG or a new contractor sufficiently in advance of the Contract expiry date. This shall cover two scenarios:
  - (a) An exit strategy for the initial 4 year term of the Contract; and
  - (b) An exit strategy in the event of an extended, 5 year Contract, with any TUPE information requested by the authority being provided within 1 month of the request.

## 13. SECURITY AND CONFIDENTIALITY REQUIREMENTS

13.1 The Supplier shall comply with all relevant Government security policies and any MHCLG-specific security policies as may be notified to the Supplier from time to time.

#### 14. PAYMENT AND INVOICING

- 14.1 Payment can only be made following satisfactory delivery of pre-agreed certified products and deliverables.
- 14.2 Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.
- 14.3 Invoices should be submitted to: CP2PTeam, MHCLG, 4th Floor, High Trees, Hillfield Road, Hemel Hempstead, HP2 4XN

#### 15. CONTRACT MANAGEMENT

- 15.1 The Contractor shall have contract management and performance reporting processes that shall provide transparency and assurance to MHCLG that the requirements stated in the Contract are being, and shall continue to be, successfully delivered, and that the Contract objectives are being met.
- 15.2 The Contractor's processes shall demonstrate and / or provide:
  - a) Robust and effective internal governance arrangements, including appropriate fraud and conflict of interest prevention measures;
  - b) Robust and effective and risk management procedures, including financial distress and business continuity planning;



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- c) Robust and effective financial management of the Contract, in line with Managing Public Money principles;
- d) Quality assurance in respect of service delivery, and specifically achievement of the SLAs set out in Section 12 above.
- e) Arrangements to manage any service delivery failures and ensure these are remedied, including clear escalation processes;
- f) Satisfaction of the Management Information requirements set out in Schedule 1 Part C (Management Information) of the original contract;
- g) Collation and consideration of feedback from Customers, MHCLG, GDS and other key stakeholders,
- h) A complaints procedure for Customers
- i) Continuous improvement to the Service, including where this feedback identifies specific improvement opportunities or weaknesses.
- j) Regular and periodic reporting on housing progress and other neighbourhood planning outcomes.
- 15.3 Attendance at Contract Review meetings shall be at the Supplier's own expense.

#### 16. LOCATION

- 16.1 The location of the Services will be carried out at the Supplier's premises with meetings held at MHCLG's premises as and when required.
- 16.2 All aspects of the Supplier's work are expected to be planned and delivered in line with the relevant Working safely during coronavirus (COVID-19)" guidance: https://www.gov.uk/guidance/working-safely-during-coronavirus-covid-19.



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#### **Annex A – Application Form**

#### Neighbourhood Planning blank application template (updated 15/04/21)

In this document, you will see all the questions which are asked on the application form; this varies depending on your eligibility and what you are applying for (e.g. grant and/or technical support, or high street and social infrastructure support).

The application form is broken down into the following sections:

- 1. Questions every group will be asked (regardless of whether you are applying for technical support, grant, or high streets and social infrastructure support)
- 2. Questions you will be asked if you are applying for Bespoke high street regeneration and social infrastructure support
- 3. Questions you will be asked if you are eligible for technical support
- 4. Questions you will be asked if you are eligible for grant
- 5. Questions every group will be asked prior to submitting the application form

In order to have all the information ready for your application submission, please read our Guidance Notes thoroughly before proceeding with this form.

If you are applying for grant and/or technical support, you have 15 days to submit your application form.

If you are applying for the Bespoke high streets and social infrastructure support, you have 15 days to submit your application form, or until 5pm on 17 May 2021, whichever is sooner. This is because applications for this bespoke support closes at 5pm on 17 May 2021.

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## 1.) Questions every group will be asked

Question  About your organisation	Answer explanation/notes Close the window if you wish to come back to this survey at any point. When you revisit the link, remember to press next on each page when you make changes to ensure updates are saved. Once you have submitted this form you will not be able to make changes or submit this unique form again.  Please note, you may not be asked every question below, this will depend on how you answer other questions on the form.	Your answer
About your organisation		
Please provide us with an alternative contact name and details (phone number and email address)	This person will be contacted about the application if we cannot get hold of the main applicant.	Max 200 words
How many years has your organisation been in operation? - Under 6 months - 6 months to 12 months - 12 months to 2 years - Over 2 years		Picklist (choose only one option)
Please can you <b>briefly</b> outline your organisation's aims?	This gives an insight into how ambitious an organisation is.	Max 200 words
Which type of organisation are you representing? - Parish Council - Town Council - Designated Neighbourhood Forum - Prospective Neighbourhood Forum	Please note that if you are in an area with a Parish or Town Council you cannot be a neighbourhood forum.	Picklist (choose only one option)

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Have you had previous Locality Neighbourhood Planning grant(s) during the period <b>April 2015 to now</b> , for the production of your neighbourhood development plan (NDP)/neighbourhood development order (NDO)?  - Yes  - No	This will determine the amount of grant support you are eligible to apply for	Picklist option)	(choose	only	one
If yes, please give details including the NPG reference number and the amount of grant received	It is important to ensure we do not have different organisations names (i.e. 'X Parish Council' and 'X Parish Council steering group'). Please provide only one name and make sure this is consistent with previous applications, i.e. if you are a parish or town council please say 'X Parish Council'.	Max 200	) words		
If yes, have you submitted your end-of-grant reports for the grant(s) listed above? - Yes - No	Please note that we cannot offer grant support if you have not completed end-of-grant reports for all previous grants. If you have any underspend from your last grant, this will need to be returned to Groundwork as any new grant cannot be approved until the funds are received by them.	Picklist option)	(choose	only	one
Have you had previous Locality Neighbourhood Planning technical support** during the period April 2015 to now, for the production of your neighbourhood development plan (NDP)/neighbourhood development order (NDO)?  - Yes - No	** Technical support is provided by one of our delivery partners such as AECOM, RICS, Intelligent Plans and Examinations etc.	Picklist option)	(choose	only	one
Have you had other support with your NDP/NDO? - Yes - No	Please note: this could include support from Locality, Planning Aid, Campaign to Protect Rural England (CPRE)/National Association of Local Councils (NALC), Design Council CABE plus any consultancy support or pro-bono support you have received to progress your neighbourhood plan etc.	Picklist option)	(choose	only	one



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If yes, please indicate which support programme (tick all that apply) - Locality - Planning Aid for London - Planning Aid England - CPRE/NALC - Design Council CABE - Consultants - Pro bono support - Students - Other	This will give us another indication as to the stage and knowledge within the group	Checkbo options)	ox (choos	se mu	ultiple
If Other, please specify		Max 50	words		
Demographic Information Region/Local Authority Information	Diagon place an arifu your Legal Authority, this balon to inform any matical minture of	Diaklist	(abass	on!:	one
Which region and Local Planning Authority (LPA) is the NDP/NDO located in? Please select the region and the corresponding lead LPA from the list below: - East of England - East Midlands - Greater London - North East - North West - South East - South West - West Midlands - Yorkshire & Humber	Please also specify your Local Authority, this helps to inform our national picture of neighbourhood planning activity	Picklist option)	(choose	only	one
Local Authority	This is a picklist, once you have selected your region; you will be given a list of the local authorities in that area.	Picklist option)	(choose	only	one

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Are you working across boundaries or located in a national park? - Yes	This will help us to establish what issues/challenges you might face	Picklist (choose only one option)
- No		
If you answered 'yes' above, please name the additional LPAs		Max 200 words
Area Context: Urban Rural Mixed urban/rural Coastal Suburb Inner City Market Town	This will help us to establish what issues/challenges you might face	Checkbox (choose multiple options)
Ward Area Name(s)		Max 200 words
What is the estimated population of the proposed or designated neighbourhood area to be covered by the NDP/NDO?	Use <a href="https://www.nomisweb.co.uk">https://www.nomisweb.co.uk</a> or ask the Local Authority to help you find this information	Numerical field
As also requested in the Expression of Interest form, please find the percentage of deprivation in your area by copying and pasting this into your browser, and use the 2019 date: http:dclgapps.communities.gov.uk/imd/iod_index.html - 20% or less (shows an area with the least deprivation) - 21%-40% - 41%-60% - 61%-80% - 81% -100% (shows an area with the most deprivation)  Progress on your Neighbourhood Plan	This will help us to establish what issues/challenges you might face	Picklist (choose only one option)

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Please outline your progress to date with your NDP/NDO	This will give an indication of your ambitions and progress to date, i.e. how fast or slow you are moving through the process	Max 200 words
How long have you been working on your NDP/NDO? - 0-3 months - 3-6 months - 6-12 months - 12-18 months - More than 18 months	This will indicate what activity we might expect to see	Picklist (choose only one option)
Are you modifying a Made neighbourhood plan? - Yes - No	If your plan has been through referendum and has been 'Made' by the Local Authority as is part of the Local Plan then you should answer yes to this question.	Picklist (choose only one option)
If yes, on what date was the neighbourhood plan made by the LPA?	State the date that the plan you are modifying was made (i.e. the date the LPA brought it 'into force'). Only visible to groups who have made a neighbourhood plan	Date field
Has the neighbourhood area been designated by the LPA? - Yes - No		Picklist (choose only one option)
If yes, please provide the date neighbourhood area was designated		Date field
Has your neighbourhood forum been designated by the LPA? - Yes - No	This will indicate what activity we might expect to see.  Only visible for Forums	Picklist (choose only one option)
If yes, please provide the date neighbourhood forum was designated	Only visible for Forums	Date field

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#### Reg 14 Consultation (Pre-Submission Consultation)

This is the formal six week consultation on a draft neighbourhood plan before it is submitted to the local planning authority for examination.

If you are updating a Made neighbourhood plan, please respond to the questions in this section with reference to the plan you are currently updating, rather than the plan that is already made.

NB: We will only ask the following questions (<u>up to the "Additional Information I" section</u>) to groups who have stated that their neighbourhood area <u>has</u> been designated by the LPA

Have you commenced your six-week consultation? - Yes - No	This is the formal six-week consultation on your draft neighbourhood plan before it is submitted to the local planning authority for examination.	Picklist option)	(choose	only	one
If yes, please provide the date the six-week consultation commenced		Date fie	ld		
Have you completed your six-week consultation? - Yes - No		Picklist option)	(choose	only	one
If yes, please provide the date the six-week consttation was completed		Date fie	ld		
Have you considered consultation responses and made any necessary amendments to the plan?  - Yes  - No	If you have completed 6 weeks consultation on your draft plan have you looked at and provided responses to all the comments and feedback you have received, and does this now form part of the Consultation Statement?	Picklist option)	(choose	only	one
If yes, consultation comments	Provide a brief list of the key issues and comments on your draft plan	Max 200	) words		
Have you submitted your plan to the LPA? - Yes - No	If you have a full draft plan, including the Basic Conditions Statement and the Consultation Statement along with all the evidence supporting your draft plan and have submitted this to the Local Planning Authority for them to complete 6 weeks consultation you should be ticking yes.	Picklist option)	(choose	only	one

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If yes, what date did you submit your plan to the LPA?		Date field
If no, what is the target date for completing your NDP/NDO and submitting it to the LPA?	Please provide an estimate if not known.	Date field
Has the referendum been arranged? - Yes - No	Please note, owing to COVID-19, all neighbourhood planning referendums that have recently been cancelled, or are scheduled to take place, between 16 March 2020 and 5 May 2021 are postponed in line with the Local Government and Police and Crime Commissioner (Coronavirus) (Postponement of Elections and Referendums) (England and Wales) Regulations 2020 until 6 May 2021  If you are modifying a Made plan and you are not yet sure if your plan requires a referendum, please select 'No' here.	Picklist (choose only one option)
If yes, please provide the date set for the referendum		Date field
Additional Information I.		
Does the LPA have an up to date adopted Local Plan? Yes - No	The Local Plan is the name for the collection of documents prepared by your LPA for the future development of the local area. You can find out if your LPA has an up to date adopted Local Plan by speaking to them directly.  You can find out the contact details for your Local Planning Authority by cutting and pasting the following link into your browser https://1app.planningportal.co.uk/YourLpa/FindYourLpa?searchText	Picklist (choose only one option)
If yes, what year was the plan adopted?		Date field
If yes, please cut and paste the URL link to your LPA's Adopted Local Plan here	Please include the full URL, including 'http://' or 'https://'	URL only
Is the LPA preparing a new Local Plan - Yes - No	If you are not sure please speak to the LPA	Picklist (choose only one option)
Please cut and paste the URL link to your LPA's Local Plan page here	Please include the full URL, including 'http://' or 'https://'	URL only

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Do any parts of your neighbourhood plan area have any special designations? If so, please select all that apply - Conservation area - Area of Outstanding Natural Beauty - National Park - Sites of Special Scientific Interest - Ramsar - No - Other	This will inform us for any specific planning issues your group might face	Checkbox (choose multiple options)
If other, please specify		Max 25 words
Does the Local Plan/emerging Local Plan seek to allocate housing in the neighbourhood area? - Yes - No	Please call your Local Planning Authority if you are unsure.  This information is needed to understand the growth planned for your neighbourhood area and the existing planning context	Picklist (choose only one option)
If yes, how many houses (in total) are allocated in the Local Plan or emerging Local Plan to the neighbourhood area?		Numerical field
Are you proposing to allocate sites for housing or mixed development? - Yes - No - Not sure yet	These are <i>sites</i> where you plan for and expect to see development come forward over the lifetime of your plan. This information is needed to understand your approach to development in your area.	Picklist (choose only one option)
If yes, please give the number of sites you are proposing to allocate		Number and words, max 200 words

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If yes, please add any comments you may have on your site allocations here	For example:  • have you completed a full assessment of all sites;  • have the LPA considered the sites you wish to allocate;  • do you know the likely number and types of houses that will be allocated to each site;  • is the landowner happy that the site will be allocated.  This information helps us to understand the work you have completed in respect to site allocations.	Max 200 words
If you selected 'Not sure yet' to 'Are you proposing to allocate sites for housing or mixed development?' then you will be asked:  As you selected 'Not sure yet' above, how likely is it that you will be adding sites for housing or mixed development?  - Likely - Unlikely		Picklist (choose only one option)
If you selected "Likely", please add any comments you have on your likely site allocations here		Max 200 words
Are you considering allocating sites or parts of sites for affordable housing for sale?  - Yes - No - Too early to say	If you are considering or intending to allocate sites or part of a site for affordable housing for sale, then you will be likely to say yes to this question.  If it's too early to say, then you may be considering a Housing Needs Assessment to determine if there is a need for affordable housing for sale in your neighbourhood area.	Picklist (choose only one option)

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If yes, please provide more information about the site(s)	What information have you already gathered about these sites?	Max 200 words
If you are still considering bringing forward affordable housing for sale, are you actively investigating the need?  - Yes - No		Picklist (choose only one option)
Depending on how you answered some of the questions in the Eol and if you answered "Too early to say" above, you may be asked if you are actively investigating the need for affordable housing for sale. If you are actively investigating the need, you will then be asked:	This will help us determine your eligibility for the Affordable Housing for sale support.	Max 200 words
"Please can you evidence how you are investigating this need (e.g. through housing needs assessment or gathering other evidence that will help you establish local housing need)"		
Is there a need for affordable housing for sale in your neighbourhood area? - Yes - No - Too early to say	At an early stage you may not know if there is a need for affordable housing for sale in your neighbourhood area. If this is the case, then please select too early to say.	Picklist (choose only one option)

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- No

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Depending on how you answered some of the questions This will help us determine your eligibility for the Affordable Housing for sale support. in the EoI and if you answered "Too early to say" above, you may be asked if you are actively investigating the need for affordable housing for sale. If you are actively investigating the need, you will then be asked: "Please can you evidence how you are investigating this need (e.g. through housing needs assessment or gathering other evidence that will help you establish local housing need)?" If yes, do you know what the need is? Picklist (choose only one If you do know what the need for affordable housing for sale in your neighbourhood area is then you will say yes to this answer. - Yes option) - No If yes, please explain Please provide information about what you already know about the need for Max 200 words affordable housing for sale in your neighbourhood area. Depending on how you answered some of the questions This will help us determine your eligibility for the Affordable Housing for sale support. in the EoI and if you answered "No" above, you may be asked if you are actively investigating the need for affordable housing for sale. If you are actively investigating the need, you will then be asked: "Please can you evidence how you are investigating this need (e.g. through housing needs assessment or gathering other evidence that will help you establish local housing need)?" You will say yes to this question if you are providing for more houses to be built in Are you planning for more homes than are allocated in the Picklist (choose only Local Plan or emerging Local Plan? your neighbourhood area that those allocated to your neighbourhood area in the option) - Yes Local Plan.

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- No

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Please specify the number of houses you are planning for Number and words. max 200 in the neighbourhood plan words Why are you seeking to allocate more homes than the Max 200 words Local Plan or emerging Local Plan? Are you assessing sites within your neighbourhood area Picklist (choose only one If you are or intend to undertake an assessment of the sites in your neighbourhood area to determine which would be most suitable and likely to come forward for with a view to making site allocations in your option) neighbourhood plan? development over the lifetime of your plan, then you will be likely to say yes to this - Yes question. - No If yes, have you completed a call for sites? A call for sites is the chance for individuals and organisations to suggest sites that Picklist (choose only one they feel may have potential for development (housing, mixed use, employment) - Yes option) - No If yes, please give the number of sites you are assessing Number and words, max 200 or will assess words If yes, what do you already know about the sites? What information have you already gathered about these sites? Max 200 words Are you considering assessing sites or parts of sites for If you are considering or intending allocate sites or part of a site for affordable housing Picklist (choose only one affordable housing for sale? for sale, then you will be likely to say yes to this question. option) - Yes If it's too early to say, then you may be considering a Housing Needs Assessment to - No - Too early to say determine if there is a need for affordable housing for sale in your neighbourhood area. Max 200 words If yes, please provide more information about the site(s) What information have you already gathered about these sites? Are you seeking to influence design through your NDP? This helps us understand how your plan will shape design. Picklist (choose only one - Yes option)

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If yes, please explain how you are seeking to influence design	An opportunity to explain what your plan will be doing in design terms. For example, are you including a design code? You can also read about what constitutes a design code under the Advice section of our website.	Max 200	) words		
Additional Information II.					
What level of planning expertise is available in the group (volunteer or external professional support)? - High level skills - Medium level skills - Low level skills	If you have a qualified planner as part of your group, then you have a high level of skills. If you have no planning expertise, then you will have a low skills level.	Picklist option)	(choose	only	one
What is the level of volunteer time available in the group? - Considerable volunteer time - Some volunteer time - Limited volunteer time	If you have members of the group who can spend one day a week working on your plan, then you have considerable volunteer time.  If most of your group can only spare a few hours in the evening and/or at weekends, then you have some volunteer time.	Picklist option)	(choose	only	one
Is any paid support available, such as staff time, for example from your LPA or Parish Council? - Considerable staff time - Some staff time - Limited staff time		Picklist option)	(choose	only	one
If support is available, please provide details on which groups/organisations are supplying it		Max 200	) words	_	

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Please tell us about the sources of income for developing your NDP/NDO	Checkbox (choose options)	multiple
- None		
- LPA		
- Other grants		
- Parish precept		
- Fundraising		
- Other		
If other, please specify	Max 50 words	



## Attachment 3 – Statement of Requirements

Locality Site Viability Technical Support and High Street Regeneration and Social Infrastructure Support Contract Reference: CPD 004 118 172

2.) Questions you will be asked if you are applying for bespoke high streets regeneration and social infrastructure support

Bespoke high streets and regeneration support needed	prynig for bespoke nigh streets regeneration and social infrastructure so 	
Will your NDP propose regeneration objectives?  - Yes - No		Picklist (choose only one option)
If yes, what areas of your neighbourhood are in need of regeneration? What are you aiming to achieve?	This will help us get an understanding of context.	Max 200 words
Are you proposing a high street project? - Yes - No		Picklist (choose only one option)
If yes, what project are you proposing?	Please set out clearly what your project is.	Max 300 words
If yes, why is your high street in need of support?	Please explain clearly why your high street is in need of support (e.g number of vacant units, issues related to pedestrianisation, not enough seating, etc.)	Max 300 words
Please provide the full postcode for the centre of the high street in need of support		
Are you proposing a social infrastructure project?  - Yes - No		Picklist (choose only one option)
If yes, what project are you proposing?	Please set out clearly what your project is.	Max 300 words
If yes, why are you in need of the social infrastructure project?	Please explain clearly why you are in need of the social infrastructure project (e.g lack of childcare facilities, inadequate health facilities, etc.).	Max 300 words
Please describe how this support package would help you move forward	Please set out how the bespoke support would help your progress with your project proposals.	Max 300 words
Are there any barriers to making progress with your plan (such as active planning applications, conflicting local views over how the area should be developed, lack of support from LPA etc.)?		Max 200 words



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## 3.) Questions you will be asked if you are eligible for technical support

#### **Technical Support Needed**

You can receive Grant and Technical Support at the same time. Applying for Technical Support will not prevent you accessing grant, providing you are eligible for grant support, and the Technical Support could be best used to complement the use of grant. This will help groups make the most of grant and move their plan-making process on more smoothly. To find out more about the support offered please see the guidance notes.

Please note you can only apply for one support package at a time, but you may make concurrent applications at any time. Please apply for the support you need first. Please refer to our Technical Support guidance for a full explanation on each package.

Question	Answer explanation/notes	Your answer
What kind of support are you looking for? Please select a support package from the list below (N.B. This list will vary, depending on responses provided in the Eol)	Please have a read through the guidance notes to read more about this package of support. This is only available for forums.	Picklist (choose only one option)
<ul> <li>Design Including Design Codes</li> <li>Environmental Impact Assessment-</li> <li>Evidence Base and Policy Development</li> </ul>	If you select Forum Development, you will be asked if have you applied to the LPA for designation yet? - Yes - No	
<ul> <li>Facilitation for designated neighbourhood forums and/or groups in deprived areas</li> <li>Habitat Regulations Assessment</li> <li>Housing Needs Assessment</li> </ul>	If you are applying for Strategic Environmental Assessment, Environmental Impact Assessment or Habitats Regulation Assessment you will be asked to attach the screening opinion from the LPA.	
<ul> <li>Masterplanning</li> <li>NDO Facilitation</li> <li>Plan Health Check</li> </ul>	If you have accidentally attached the wrong document, please upload the correct document and this will automatically replace the wrong one.	
<ul> <li>Setting up a Neighbourhood Planning Group (in unparished areas only)</li> <li>Site Options and Assessment</li> <li>Site Viability</li> </ul>	If you do not yet have a screening opinion you will be asked whether or not you have requested one from your LPA. If you have requested one, you will be asked to attach the letter of request. If you have not yet asked for a screening opinion, you will not	



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<ul> <li>Strategic Environmental Assessment</li> <li>Technical Support Not Required</li> </ul>	currently be eligible for Strategic Environmental Assessment, Environmental Impact Assessment, Or Habitats Regulations Assessment.	
	If you are applying for a Plan Health Check you will be asked do you have a full draft plan.	
Please describe how this support package would help you to move forward	You need to provide us with why you believe the support will help you to prepare your plan.	Max 200 words
Are there any barriers to making progress with your plan, (such as active planning applications, conflicting local views over how the area should be developed, lack of support from the LPA etc.)?	Your answer to this question will help us to understand the level of support you might need.	Max 200 words



#### Attachment 3 – Statement of Requirements

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#### 4.) Questions you will be asked if you are eligible for grant

#### **Grant Support**

All neighbourhood groups can apply for grants of up to £10,000 per neighbourhood planning area, less any funding from grant(s) used after 17 April 2015.

NB: **Applications must be between £1,000 and £10,000 per application**. This means that if you are deemed eligible for Additional Grant or Affordable Housing for Sale Grant, you cannot apply for more than £10,000 at a time.

Grants can be used to support groups with the production of the NDP/NDO. The earliest start date for grants is 4 weeks after you submit your grant application. If your application is successful, you will then have until the end of the financial year (31 March 2022) to spend this. We would like to encourage you to consider your needs for the period up to 31 March, so that you do not need to make multiple applications.

Eligibility for the additional grant or Affordable Homes for Sale grant is dependent upon meeting the relevant criteria. The inclusion of the additional grant and/ or Affordable Homes for Sale grant in your application form is not confirmation that you have met these criteria and this will be checked as part of the grant assessment.

Question	Answer explanation/notes	Your answer
Are you applying for a grant? - Yes - No		Picklist (choose only one option)
Please tell us the start date of your grant activity	Under no circumstances can we fund activity that has happened in the past or prior to a grant being awarded. Therefore, this date should not be less than a month from the date of your application and fall no later than Feb 2022	Date Field
Please tell us the end date of the final activity that this grant will cover	Please tell us when the activities funded by this grant will end. Please note that no activity can take place later than the end of the financial year (31st March 2022) in which you submitted your application.  Any grant funding must be spent by the end of the financial year. Therefore your application will be automatically rejected if the dates are outside this period.	Date Field

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Type of activity (please select from options below)	Type of Activity detail	Budget breakdown	Cost (£)
Budget Item 1: Professional Fees This section will only appear if you selected 'professional Fees'  The section will only appear if you selected 'professional Fees'  The section will only appear if you selected 'professional Fees'  The section will only appear if you selected 'professional Fees'  The section will only appear if you selected 'professional Fees'  The section will only appear if you selected 'professional Fees'  The section will only appear if you selected 'professional Fees'  The section will only appear if you selected 'professional Fees'  The section will only appear if you selected 'professional Fees'  The section will only appear if you selected 'professional Fees'  The section will only appear if you selected 'professional Fees'  The section will only appear if you selected 'professional Fees'  The section will only appear if you selected 'professional Fees'  The section will only appear if you selected 'professional Fees'  The section will be set in the section of the section will be set in the section of			
What are you applying to fund? - Professional Fees - Projects Costs	You can apply for funding from each of t upon what grant support you want.	hese sections, or just from one depending	Checkbox
Please ensure that the total costs in this application	do not exceed £10,000. Grant applications	s that are outside of this range will be aut	omatically rejected.
You will also need to tell us the project costs .i.e. how m in the village hall at a cost of £40 per booking – giving a		00 leaflets at 20p each – giving a total of £1,	000 for printing; Or 5 meetings
Remember to include VAT if you are a designated/prosreasonable expenses.	pective neighbourhood forum. Please note t	hat the maximum day rate that we will pay	is £550 per day plus VAT and
You will need to tell us the professional fees that you was working with you.	nt to pay as part of your project. We will need	d to know the day rate that you propose to pa	ay for any consultants who are
<b>Budget Breakdown Section:</b> In this next section of the applying for, why you need the support, length of time to			. (i.e. how much grant you are

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- Consultants - Technical reports	Description of the work to be carried out.	Text area to provide breakdown of costs	Numerical field
- Training sessions - Facilitator costs - Other		We will need to know the day rate that you propose to pay for any consultants who are working with you.	
		Remember to include VAT if you are a designated/prospective neighbourhood forum. Please note that the maximum day rate that we will pay is £550 per day plus VAT and reasonable expenses.	

#### **Budget Item 2: Project Costs**

This section will only appear if you selected 'Project costs' above and the following questions will be repeated five times, to give you enough space for your responses.

Type of activity (please select from options below)	Type of Activity detail	Budget breakdown	Cost (£)
- Room hire - Website Development - Publicity Costs - Printing Costs - Other	Description of the project cost,	Text area to provide breakdown of costs i.e. how much each item/area of work will cost. (example: 5000 leaflets at 20p each – giving a total of £1,000 for printing; Or 5 meetings in the village hall at a cost of £40 per booking – giving a total for £200 for room hire).	Numerical field

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Question	Answer explanation/notes	Your answer		
Total value of grant you are applying for	Please note that the minimum value you can apply for is £1,000 and the maximum value you can apply for is £10,000. Grant applications that are outside of this range will be automatically rejected.	Numerical field		
Please explain why this grant is needed	Please note that the answer given here is important in the grant assessment, and should explain what you hope to achieve	Max 200 words		
Please explain how it will help your NDP/NDO to move forward	This information will help those assessing your grant application to see that you are clear and can explain how the grant will help you to prepare your neighbourhood development plan.	Max 200 words		
If you are commissioning expert support, please give details of the name, qualifications and professional memberships of the person(s) you intend to use	You will only be asked this question if you are using a consultant. Please do not insert a CV/CVs here	Max 50 words		
Please attach a supporting document for consultant/website costs here	You must include all the quotes from all the professionals/consultants you are thinking about using. Please compile these into one document to upload.  If you attach the wrong document, upload the correct one and this will automatically replace the incorrect attachment.	Attach a document		
Are you incurring any additional costs related to coronavirus (COVID-19)? -Yes - No	We cannot cover PPE, or any retrospective funding. The costs that are eligible are subscriptions to virtual meeting platforms, additional printing and postage for example.  You can still apply for public consultation costs at this time, even if social restriction measures do not allow you to conduct them at this time.	Picklist (choose only one option)		

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If yes, are any of these additional costs within the budget provided in this application, above? -Yes -No	To understand more about the impact of coronavirus on neighbourhood planning we would like to know more about any additional costs you have incurred.  This data will be reported back to MHCLG to improve their understanding of the impact of coronavirus and the ways in which neighbourhood planning groups are working within the current environment.	Picklist (choose only one option)
If yes, what types of additional costs are you incurring. Please tick all that apply Virtual meeting platforms Printing and postage Website development Online survey development Other		Checkbox (choose multiple options)
If you have selected 'Other' above, please specify		Max 50 words
What is your total additional coronavirus-related expenditure, in relation to the budget above that you have included within this grant application?	Costs provided in answer to this question should already be included within the budget in this application and will not be looked at separately.	Numerical field

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Please itemise this additional expenditure

Max 200 words



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#### 5.) Questions every group will be asked prior to submitting the application form

#### Submission Question **Answer explanation/notes** Your answer Please indicate which category applies to If you are a prospective forum/unincorporated neighbourhood forum and you are Picklist (choose only your successful, you will need to nominate an incorporated organisation/charity to hold the option) organisation grant on your behalf. Similarly if you are an incorporated neighbourhood forum, and - I am a Parish/Town Council - I am an incorporated forum and have a bank account you do not have a bank account (with two named signatories), you will need to open one in your organisation's name, or nominate an incorporated organisation/charity to with 2 signatories - I am incorporated forum but do not have a bank account hold the grant fund on your behalf please provide details of this organisation in the with 2 signatories but have a fund holder that meets the section below. grant criteria - I am NOT an incorporated forum but have a fund holder If you are a Town/Parish Council, or an Incorporated Neighbourhood Forum with a that meets the grant criteria bank account you do not need a separate fundholder. If you answered: - I am incorporated forum but do not have a bank account with 2 signatories but have a fund holder that meets the grant criteria; or - I am NOT an incorporated forum but have a fund holder that meets the grant criteria You will be asked the next three questions (fund-holder name, email address and phone number). Fund-holder Organisation Name Max 200 words Fund-holder Email address Max 200 words

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Fund-holder Phone Number	Max 200 words				
Would you like to receive the quarterly Neighbourhood Planning newsletter? - Yes - No		Picklist option)	(choose	only	one
Would you like to receive relevant information about Neighbourhood Planning, events, funding opportunities and other items of interest?  - Yes  - No		Picklist option)	(choose	only	one
Do you consent for us to use your data for the purposes of any research or evaluation which might be commissioned in respect of neighbourhood planning?  - Yes  - No		Picklist option)	(choose	only	one



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Submit button	Please do not press the submit button, until you are ready to submit your application form.	
	Once you have submitted this form you will not be able to make changes or submit this unique form again.	
	Thank you for taking the time to complete the form and update your information. Please click 'Submit' to complete.	
	Once you have clicked 'Submit', you will receive an automated response from us, which will contain a link to your submitted application which you can save (by clicking 'Print' at the top-right of the page and changing the 'print destination' to 'Save as PDF') or print for your records.	
	By submitting an application you are providing us with data, including your personal details and those of the alternative contact. Locality, Groundwork (as grant administrator), our delivery partners and the funders of the programme (MHCLG) will use this data to process your application.	
	In submitting this application I declare that all the information provided is true and accurate. I understand that if the information provided is false or misleading, then this may invalidate my application.	
	Locality is the trading name of Locality (UK) a registered company limited by guarantee, registered in England no. 2787912 and a registered charity no. 1036460	