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# District Plan Delivery Study Specification – 6.06.2014

## Introduction

### Overview

1. The main aim of the Delivery Study is to help the Council to decide whether or not the sites and locations set out in the draft District Plan meet the relevant requirements for an effective and deliverable plan as set out in the National Planning Policy Framework (NPPF) and the accompanying Guidance (NPPG) and therefore whether each option should be taken forward as proposed, amended, or excluded from further consideration.
2. In particular the focus of the Delivery Study is on integrating a wide range of evidence around infrastructure, viability, and delivery matters. The Council has undertaken a significant amount of research but there remain some gaps in understanding the deliverability of the draft Plan.
3. The Delivery Study will be a key piece of evidence at Examination in Public of the District Plan. The consultants should be prepared to attend the Examination in Public of the District Plan in 2015, to explain the Delivery Study methodology, evidence base inputs and conclusions.
4. The work is one commission with multi-disciplinary inputs, and should be managed to provide coherent outputs which are well related and easy to read and understand as far as possible.

### National Guidance and Requirements

5. The consultants are expected to have a good understanding of the national guidance and requirements in the NPPF and NPPG, including the implications for plan-making.
6. In particular, the Study should enable the District Council to demonstrate at Examination that it has complied with the requirements of Paragraphs 173 to 177 of the NPPF ('ensuring viability and deliverability').
7. The NPPF requires that plans should be positively prepared, justified, effective, and consistent with national policy (Paragraph 182). The Delivery Study should advise on the effectiveness requirements and how these relate to the emerging East Herts District Plan in particular.
8. The NPPG states that: *"The Local Plan should make clear, for at least the first five years, what infrastructure is required, who is going to fund and provide it, and how it relates to the anticipated rate and phasing of development. This may help in reviewing the plan and in development management decisions. For the later stages of the plan period less detail may be provided as the position regarding the provision of infrastructure is likely to be less certain."*

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9. Paragraph 174 of the NPPF states that *“Where practical, Community Infrastructure Levy charges should be worked up and tested alongside the Local Plan”*. The NPPG states that *“Where local planning authorities intend to bring forward a Community Infrastructure Levy regime, there is a strong advantage in doing so in parallel with producing the Local Plan, as this allows questions about infrastructure funding and the viability of policies to be addressed in a comprehensive and coordinated way”*.
10. There is also extensive guidance on the viability and plan-making set out in the NPPG.

### **Background**

#### **District Plan – Preferred Options Stage (March-May 2014)**

11. East Herts Council has recently completed consultation on its Preferred Options District (Local) Plan, which includes provision for 15,000 homes in the period 2011-2031, including a number of large development sites across the District. The draft Plan proposes
  - Site allocations for the period to 2021, including urban extensions ranging in size from 50 to 1,000 dwellings. For these locations national policy requires that there should be a high level of certainty that development can take place, and that the locations should be ‘deliverable’, as defined in paragraph 47 of the NPPF.
  - Broad Locations for Development in the period after 2021, including:
    - a range of 200-3,000 dwellings north and east of Ware (1,800 by 2031)
    - 1,700 east of Welwyn Garden City (450 by 2031)
    - 5,000-10,000 in the Gilston Area north of Harlow (3,000 by 2031)
12. At Preferred Options Stage there remains uncertainty around the deliverability and scale of the Broad Locations. For these locations national policy requires that the areas should be ‘developable’, as defined in paragraph 47 of the NPPF, and that there should be a reasonable prospect that development can take place.

#### **Broad Locations DPD**

13. A Broad Locations Development Plan Document (DPD) is proposed following the adoption of the District Plan, which will provide further opportunity for more detailed testing and Green Belt boundary review for the Broad Locations. The Delivery Study should assemble evidence proportionate to the requirements of the District Plan Examination in Public, rather than the subsequent DPD.
14. Different levels of evidence are anticipated at the current stage in light of this further DPD. Not all matters may be capable of full resolution now as this

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subsequent stage provides a further opportunity for testing. However, the District Plan Delivery Study should be prepared in such a way as to provide a basis for the further DPD, which will be a separate commission following adoption of the District Plan. This work will be subject to a future competitive tender and brief, and applicants for the current work are not expected to submit costed proposals for this work.

### Infrastructure Delivery Plan (IDP)

15. East Herts Council has established a template IDP which is currently being populated with cost and funding data by the infrastructure providers. This process is anticipated to be largely complete by the start of the commission. However, there are likely to be evidence gaps which the consultants will need to identify and seek to fill. The consultants will need to verify information provided by the site promoters as far as possible.
16. Taking account of the cross-boundary nature of infrastructure planning, the IDP will be structured around three main parts, each of which will be prepared with input from adjoining Districts/Boroughs as appropriate:
  - An **eastern part** including relevant cross-boundary infrastructure considerations in Harlow, Epping Forest, and Uttlesford Districts as well as addressing infrastructure needs arising from the site allocations in Bishop's Stortford, Sawbridgeworth, and the Gilston Area Broad Location;
  - A **central part** including development in the area of the A10 Corridor including Hertford, Ware, and Buntingford, and taking account of any cross-boundary matters involving Broxbourne Borough;
  - A **western part** including the Broad Location east of Welwyn Garden City and taking account of any cross-boundary matters Welwyn Hatfield Borough.
17. The IDP will be one of the main tools available to the Delivery Study consultants to assess the viability and deliverability of the proposed development.

### Available Information

18. A certain amount of information is already available, and a certain amount is under way. However, there is a risk that there will be gaps in the available information, and the consultants should be prepared to identify these gaps and explain how it is proposed to fill them in a manner proportionate to the requirements of Examination in Public of the District Plan.
19. Links to existing technical studies are provided in Appendix A. Council officers have asked Site Promoters to assemble cost and infrastructure information by the end of June 2014 to populate the IDP and the Delivery Study, including

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conceptual masterplans showing the location of the main items of infrastructure. The request to site promoters is attached at Appendix B.

20. It is intended that individual webpages will be set up with specific information for each site allocation and broad location in the District Plan, as this is received from the site promoters.

### **Tasks**

21. Eight separate tasks have been identified within the overall commission.
22. In order to ensure a comprehensive and co-ordinated approach, there is likely to be an iterative relationship between the tasks. It is therefore not anticipated that each task will be prepared in isolation, or that there will be a linear sequence starting with Task 1 and ending with Task 8: work from each task will need to be undertaken concurrently and subject to iterations as more evidence is assembled.
23. The consultants should advise on the scope and format of each of the tasks and their presentation together or separately as a coherent package of work.
24. In all tasks the consultants will be expected to apply their understanding of NPPF requirements and take a proportionate approach to the requirements of Local Plan-making, differentiating between the level of detail required for the first five years at allocated sites, and longer-term development at the Broad Locations.
25. Flexibility should be demonstrated in undertaking the work, since there is no obvious template to follow, given the unique set of issues facing all plan-making work. The work is likely to evolve as it progresses, and the consultants should be receptive to this and should actively identify areas which may need further attention or areas which require less attention.

### **Task 1: Review of Transport Evidence and Requirements**

26. Site Promoters have been requested to ask their transport consultants to provide evidence of the mitigation measures needed to support development of their site proposals, taking account of the cumulative impacts as far as possible.
27. Hertfordshire County Council provides some assistance to Local Planning Authorities as set out in their Protocol document. However, the District Council requires additional support to mediate between the different pressures within the context of the NPPF and ensure that the District Plan successfully balances the competing pressures on strained infrastructure and housing need.
28. Particularly for the Broad Locations for development, this work is likely to require consideration of strategic transport infrastructure outside the district, including the motorway network. The transport consultants should be prepared

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to liaise with the Highways Agency and Essex and Hertfordshire County Councils as necessary to ensure that sound decisions can be taken in relation to the approach in the District Plan.

29. The main activities under this task would be
  - 1a) to advise on the application of the 'severe impacts' test set out in Paragraph 32 of the NPPF to specific pressure points in the district, and to advise at what point any of the impacts are likely to become unacceptable;
  - 1b) to interpret and verify the evidence supplied by the site promoters and infrastructure providers and the available transport modelling evidence and its implications for the district plan;
  - 1c) to advise whether there remain gaps in the transport evidence and how and when these should be filled, whether through the District Plan, subsequent Broad Locations DPD, or through a planning application process;
30. It is anticipated that this evidence and the audit trail of communications will be written up as a section within the Delivery Study Report. Based on this work, the consultants should provide appropriate transport planning support to the District Council at Examination in Public.

### **Task 2: Review of Site Specific Concept Masterplanning**

31. In order to obtain a baseline estimate of the deliverability of development, it is necessary to first draw up an illustrative concept plan showing the main infrastructure, particularly any major roads. This information can then be used by cost consultants to estimate some of the main costs, which can then be incorporated into the viability appraisal.
32. East Herts Council has asked site promoters to prepare illustrative concept plans for this purpose. The consultants should be prepared to critically appraise these plans and where considered necessary to develop concept plans to address any evidence gaps.
33. The consultants should advise on an appropriate level of detail, necessary to meet the requirements of the NPPF, taking account of the different requirements of the first five years of the plan and the latter part of the plan period, which is also subject to a further DPD.
34. Based upon the concept masterplanning, as part of the outputs of the Delivery Study a cost consultant should:

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- 2a) Verify the reasonableness of any cost data submitted by site promoters or infrastructure providers, in particular relating to roads, schools, utilities, and GP surgeries
- 2b) use the illustrative masterplans where no costs are available, to provide approximate cost estimates for the major pieces of infrastructure required

### **Task 3: Infrastructure Delivery Plan**

- 35. The District Council is drawing together an Infrastructure Delivery Plan (IDP) infrastructure schedule, assembling costs and funding sources from infrastructure providers and site promoters. The consultants should support the District Council in progressing this work by:
  - 3a) Draw together infrastructure information into a consistent format suitable for use as the IDP;
  - 3b) Identify any critical dependencies between infrastructure delivery and the delivery of development;
  - 3c) As far as reasonably possible, take account of the cumulative impacts of development on the wider area beyond the site, in terms of strategic and local infrastructure;
  - 3d) Review the funding sources for the plan and provide verification of any funding information supplied by infrastructure providers and site promoters;
  - 3f) Suggest additional funding sources to fill funding gaps, wherever possible;
  - 3g) To suggest appropriate amendments to the infrastructure policies in the Preferred Options plan if considered necessary
- 36. The conclusions of this work should be incorporated into the Delivery Study Report. The Infrastructure Delivery Plan work will need to take account of the viability assessment (see below) to demonstrate whether or not there is a reasonable prospect of the identified costs of development being met through the identified funding sources.

### **Viability Assessment**

- 37. In order to ensure a comprehensive and co-ordinated approach, the viability assessment should take account of the 'whole basket' of costs on development, including Local Plan standards, percentage of affordable housing, site specific viability issues, and developer contributions.

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38. The commission is likely to require a mix of plan-wide viability appraisal based on a typology of sites, plus site-level viability testing where appropriate. The consultants should advise on which of the Preferred Options allocations and broad locations should be included in the site-level viability appraisal and on an appropriate level of detail. Analysis of key viability assumptions should be provided, including a commentary on local property markets and values, build costs, levels of professional fees, profit and other considerations as appropriate.
39. The viability assessment will require local property market valuation knowledge to provide up to date baseline information.

### **Task 4: Local Plan Policies**

40. The District Plan includes draft Topic policies including a number of Local Standards, including water efficiency, renewable energy, and affordable housing. The delivery study should:
  - 4a) advise on an appropriate and viable level of Local Standards including affordable housing standards;
  - 4b) Apply the latest government guidance and benchmark costs based on the best available evidence nationally.
  - 4c) Advise on the impacts of affordable housing targets and tenure mixes, taking account of existing technical studies on this;
  - 4d) Advise on the impact of potential impact of different land uses including gypsy and traveller sites on site-specific viability.

### **Task 5: Plan-wide Viability**

41. An area or plan-wide viability assessment should be carried out in accordance with the guidance set out in the NPPG. This is likely to require assessment of a typology of sites. It should update the assessments already undertaken by Lambert Smith Hampton and Levels.

### **Task 6: Location-specific Viability**

42. Given the scale and complexity of a number of the development locations proposed in the Preferred Options, it is considered that plan-wide viability assessment will not be sufficient to meet NPPF requirements. It is anticipated that for at least the three Broad Locations a site-specific viability appraisal will also be required. However, it may be that one or more of the proposed site allocations may also be sufficiently complex to require a location-specific appraisal. For this task, the consultants should:



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- 6a) Recommend which site allocations and broad locations will require location-specific viability appraisal in order to meet NPPF requirements for examination.
- 6b) Advise whether adjustments to the Topic-based or site-specific policy expectations could make an unreasonable site reasonable, and if so what adjustments would need to be made.
- 6c) For the Broad Locations for development, if these are considered viable, to suggest an appropriate scale of development with evidence sufficient to take forward to examination in public.

### **Task 7: Community Infrastructure Levy and Section 106/Section 278 costs**

- 43. Early work suggests that CIL should form part of the funding mix for the IDP, and it is anticipated that there will be corporate and political support for the introduction of the levy.
- 44. Two CIL viability studies have been undertaken (see Appendix A), both of which apply land values to a typology of sites.
- 45. Given the strong encouragement in the NPPF to undertake CIL and Local Plan work in parallel, the consultants should ensure that CIL is given early consideration as part of the comprehensive and co-ordinated approach to viability testing for the District Plan.
- 46. The consultants should advise on a proportionate approach to the introduction of CIL at this stage, taking into account that the Council's top priority is to move swiftly forward to adoption of the District Plan. The consultants should advise whether some form of interim work on CIL is adequate at this stage, to be followed by a more in-depth study suitable for use at a future CIL Examination.
- 47. The main activities anticipated for this task include:
  - 7a) Review and update the information in the LSH/Levvels studies, taking account of policy costs including affordable housing
  - 7b) Advise on a suitable upper and lower threshold for CIL, including which proposed site allocations and Broad Locations would be suitable for CIL and which would be suitable for S106 only;
  - 7c) Recommend a suitable CIL charge level for residential and other uses
  - 7d) Identify and recommend different charging zones if appropriate
  - 7e) Recommend a suitable approach to charging S106 on sites where CIL is also charged.

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48. Depending on the advice of the consultants, the CIL component may take the form of a standalone report (for a full study suitable for CIL examination) or a section within the Delivery Study (for an interim study appropriate for District Plan examination but not CIL examination).

### **Task 8: Review of Objectively Assessed Development Needs**

49. East Herts Council has established an Objectively Assessed Need (OAN) of 750 dwellings per annum, based on the Office for National Statistics Sub-National Population Projections. A figure of 9,700 jobs over the 20 year plan period, based on the East of England Forecasting Model (EEFM) has been used in the draft Plan. Guidance on the establishing of OAN is set out in paragraph 17 and 47 of the NPPF and in the National Planning Guidance (NPG).
50. The main activities for this task include:
- 8a) To review the Council's approach to establishing OAN for housing, in particular assessing the apportionment of housing between different housing market areas;
  - 8b) To review approaches to housing affordability and housing supply in establishing OAN, the consideration of market signals, and how the plan should address this; and
  - 8c) To review the approach to jobs provision, and how this should relate to housing provision;
  - 8d) Advise on the relationship between unconstrained housing need and deliverability.

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### Requirements

#### Meeting Requirements

51. It is anticipated that approximately 10 meetings will be required as follows:
- Inception meeting – should include key personnel for the various project areas
  - Broad Locations site promoters x 3 – to review evidence provided and agree how evidence gaps will be filled
  - 3 x additional meeting with site promoters and infrastructure providers to address any points of disagreement in interpretation
  - 2 x review meetings with Council officers
  - 1 x presentation to East Herts Members (evening meeting)
52. There will also be a need for the consultants to make a number of telephone calls/follow up emails to the relevant infrastructure providers and site promoters to chase up outstanding information needed for the study.

#### Outputs

53. The main output will be the Delivery Study Report, which should include the following essential items in its structure:
- a) A stand-alone Executive Summary in a large font size suitable for inclusion within Committee reports
  - b) An introduction which sets out the overall approach
  - c) A brief overview of the main issues and background evidence
  - d) A clear set of conclusions which are sufficiently robust to enable the District Council to proceed to Examination in Public
  - e) Appendices including technical information and cost/funding information suitable for entry into the Infrastructure Delivery Plan.
52. As set out in relation to Task 7 above, the CIL report may be either presented as a standalone document or as a section within the Delivery Study.
53. It is expected that the report will be drafted in an iterative fashion and the Council will be invited to review the evolving report at regular intervals. For this reason the emerging drafts should be issued in Word format to enable comments to be inserted and track change suggestions made.
54. The final report should be issued in PDF format.

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### Timeline

55. Aspects of the Delivery Study will form a critical piece of evidence in terms of identifying any necessary material amendments to the Preferred Options stage District Plan. In putting together the Council's own work programme the consultants' proposed phasing is essential to early identification of risks to the overall programme and proposals for managing these risks.
56. The Council wishes to proceed swiftly with the District Plan, and ideally would like to make a decision to consult on an amended plan at Full Council on 1<sup>st</sup> October in order to enable a full consultation by the end of the year. In order to achieve this timeline, the Council will need to present an amended Plan to the District Planning Executive Panel on 25<sup>th</sup> September, the deadline for which is **Wednesday 10<sup>th</sup> September**. It is anticipated that material amendments to the Plan will be presented to the Panel alongside the Delivery Study with an explanation of how the Plan has changed as a result of the Study.
57. The Council recognises that this is a tight timeframe for this challenging commission. Therefore consultants are requested to pay careful attention to the timetabling and prioritisation of the tasks, in order to provide an honest assessment of the feasibility of the proposed deadline. The Council is open to proposals for a staged approach to the commission, with non-critical work following on afterwards.

### **Follow-up work – potential second iteration**

57. If the testing process demonstrates that one or more of the proposed locations are not viable, or if there are significant changes to the scale of development, the Council will need to consider whether there are other locations which may be sustainable and viable during the plan period.
58. In such an eventuality, and depending on the outcomes of the Preferred Options testing process, the Council may ask the consultants to carry out a further high-level assessment of alternatives, using benchmark figures assembled as part of the study and informed by additional benchmark evidence from elsewhere.
59. There is uncertainty about the extent of requirements for a second iteration at this stage. Therefore consultants should provide details of their day rates for this additional work.

**Experience and Qualifications**

60. As will be clear from the Brief, the Delivery Study requires a bespoke approach rather than a conventional 'off the shelf' study. There will need to be an on-ongoing dialogue with the Council in order to ensure that the necessary evidence can be collected in a timely fashion.
61. The project should be led by an experienced infrastructure planner with a good all-round grasp of viability assessment for Local Plans. It is expected that this planner will be the main point of contact for the Council's Planning Policy Team. The consultant will be expected to be able to draw on expertise in the following fields:
- **Planning policy:** in order to advise on a proportionate approach to NPPF requirements, and comply with the CIL regulations;
  - **Transport planning:** general transport planner with experience assessing cumulative impacts of development;
  - **Masterplanning:** high-level masterplanning as a basis for cost consultancy and infrastructure planning, rather than detailed place-shaping design work;
  - **Infrastructure planning:** in order to understand a wide range of funding sources, phasing issues, and infrastructure types;
  - **Financial viability:** in order to understand the relationship between the 'whole basket' of costs, funding, development mix, and land values.
  - **Cost consultancy:** a quantity surveyor should be available to verify information provided by site promoters and infrastructure providers and to fill gaps in the infrastructure delivery plan.
  - **Property market valuation:** to provide robust local market valuation knowledge.
62. The successful candidate is therefore likely to be a multi-disciplinary consultancy or a smaller consultant working with other specialists in a consortium arrangement.

## Appendix A: Existing Documents and Technical Studies

District Plan Preferred Options (Regulation 18):

<http://www.eastherts.gov.uk/index.jsp?articleid=29084>

Infrastructure Topic Paper (January 2014), plus Hertfordshire County Council updates on schools and transport matters:

<http://www.eastherts.gov.uk/index.jsp?articleid=28809>

Viability studies (2012/13):

<http://www.eastherts.gov.uk/index.jsp?articleid=26932>

<http://www.eastherts.gov.uk/index.jsp?articleid=26933>

Hertfordshire Infrastructure and Investment Strategy (2010):

<http://www.eastherts.gov.uk/index.jsp?articleid=24809>

<http://www.eastherts.gov.uk/index.jsp?articleid=24810> (transport report)

Harlow Infrastructure Study (2010):

<http://www.eastherts.gov.uk/index.jsp?articleid=15563>

Rye Meads Water Cycle Strategy (2009)

<http://www.eastherts.gov.uk/index.jsp?articleid=15668>

Transport Modelling:

<http://www.eastherts.gov.uk/index.jsp?articleid=26921> (district-wide spreadsheet modelling)

<http://www.eastherts.gov.uk/index.jsp?articleid=28602> (SATURN modelling for the eastern part of the district)

Bishop's Stortford Transport Study 2006

<http://www.eastherts.gov.uk/index.jsp?articleid=15659>

Hertford and Ware Urban Transport Plan (2011)

<http://www.hertsdirect.org/services/transtreets/tranpan/tcatp/handwutp.pdf/>

Developer information:

[www.eastherts.gov.uk/developerinfo](http://www.eastherts.gov.uk/developerinfo)

**Appendix B: Site Promoter information request**

**East Herts Strategic Sites  
Information Requirements from Promoters for use in Delivery Study**

Now that EHDC has identified a development strategy and number of site allocations and broad locations in the emerging District Plan, the Council will need to quickly mobilise itself to deliver, manage and monitor a broad range of work going forward towards the consideration of consultation responses, finalisation of the strategy, and preparation for the Examination in Public.

A key component of this work is the preparation of a **Delivery Study** with a key role to help the Council to decide whether or not the sites and locations set out in the draft District Plan meet the relevant requirements for an effective and deliverable plan as set out in the National Planning Policy Framework (NPPF) and the accompanying Guidance (NPPG) and therefore whether each option should be taken forward as proposed, amended, or excluded from further consideration.

The focus of the Delivery Study is on integrating a wide range of evidence around infrastructure, viability, and delivery matters. The Council has undertaken a significant amount of research but there remain some gaps in understanding the deliverability of the draft Plan.

Site promoters will ultimately be responsible for bringing forward schemes in terms of their design and approach to delivery. Some have already advanced background work whereas others are committing to undertake a range of work necessary to provide sufficient evidence to justify inclusion in the District Plan (and therefore enable them to withstand anticipated scrutiny at Examination). The consultants appointed by the Council to undertake the Delivery Study will consider and evaluate this information to ensure that it provides a robust body of evidence.

In order to obtain a baseline estimate of the deliverability of development, it will be necessary to understand that development is technically feasible and financially viable. This will require an understanding of the nature of the land ownership, project delivery and financing as these will all have an influence on viability and deliverability. In addition it will be necessary to draw up some initial spatial plans to provide an illustrative concept plan that is suitably informed by site constraints, land conditions, topography, etc, and shows the main disposition of land uses and infrastructure, particularly major roads. This information can then be used by cost consultants to estimate some of the main costs, which can then be incorporated into the viability appraisal.

In all tasks the consultants appointed by the Council will be expected to apply their understanding of NPPF requirements and take a proportionate approach to the requirements of Local Plan-making, differentiating between the level of detail required in respect of:

- Site Allocations – deliverability. The NPPF (para. 47) calls on Councils to identify and update annually a supply of specific ‘deliverable’ sites sufficient to satisfy the identified five year housing requirement. It makes clear that to be

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considered 'deliverable' within this timeframe, sites should (amongst other things) "be available now, offer a suitable location for development now and be achievable with a realistic prospect that housing will be delivered on site within five years and in particular that development of the site is viable".

- Broad Locations – developability. The NPPF (para.47) also calls on Councils to identify a supply of specific 'developable' sites or broad locations for growth for years 6-10 and, where possible, for years 11-15. It makes clear that to be considered 'developable', sites should "be in a suitable location and there should be a reasonable prospect that the site is available and could be viably developed at the point envisaged."

Whilst there are different national policy tests for Site Allocations and Broad Locations, the scope of issues needed to demonstrate deliverability/developability is the same. The difference is the level of certainty that is required about these issues.

A suggested template of information requirements is set out overleaf which identifies the likely range of key information that the Planning Inspectorate is likely to want to be satisfied on.

### Site Deliverability Template

<b>Key Site Deliverability Issues and Information Requirements</b>
<p>1. Information on existing land ownership and current occupiers: to show that there are no impediments to delivery of the land and that suitable cost allowances/assumptions are included in viability work)</p> <ul style="list-style-type: none"><li>• Extent of land owned by promoter &amp; terms of ownership</li><li>• Existing Use(s)</li><li>• Current occupier(s) &amp; related terms</li><li>• If not 100% freehold ownership, identification of all other freehold ownerships and nature of collaboration between them (formal Collaboration Agreement, MoU, informal agreement)</li><li>• Extent of land covered by Option Agreement(s)</li><li>• Details of any Rights of Way</li><li>• Details of any Restrictive Covenants/easements/wayleaves</li><li>• Details of any further off site land assembly requirements, strategy and need for CPO</li><li>• Statement on relocation needs/logistics/phasing, compensation or cost implications relating to bringing forward sites</li></ul>
<p>2. Survey/assessment: to a sufficiently detailed level to a suitable provide basis for initial concept masterplanning and understanding of infrastructure and impact mitigation requirements. Anticipated technical areas include:</p> <ul style="list-style-type: none"><li>• Topography</li><li>• Flood risk/drainage</li><li>• Land Contamination</li><li>• Archaeology</li><li>• Heritage assets</li><li>• Ecology/trees</li></ul>



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Key Site Deliverability Issues and Information Requirements
<ul style="list-style-type: none"> <li>• Landscape/visual impact</li> <li>• Transport</li> <li>• Population impacts, child yields and education needs</li> <li>• Utilities (water/sewerage, gas, electricity, telecoms/broadband)</li> </ul>
<p>3. Illustrative Conceptual Masterplan: this need not provide a firm final considered design (as this will come forward through subsequent DPD &amp; planning applications), but provide sufficient information to demonstrate that development of sufficient scale is feasible. This is likely to require</p> <ul style="list-style-type: none"> <li>• A suite of spatial plans to identify:               <ul style="list-style-type: none"> <li>○ Key constraints</li> <li>○ Broad layout &amp; disposition of uses,</li> <li>○ Density, scale/massing (to demonstrate capacity/unit numbers are achievable)</li> <li>○ Key vehicular access points and primary route layout</li> <li>○ Green infrastructure and approach to open space, SUDS, etc;</li> </ul> </li> </ul>
<p>4. Schedule of development (related to concept masterplan):</p> <ul style="list-style-type: none"> <li>• Land use budget in hectares (housing, open space, schools, local centre(s), non-residential)</li> <li>• Floorspaces by use (GIA/sqm) (housing, schools, A1-A5, B1, D1, D2)</li> <li>• Number of additional homes by:               <ul style="list-style-type: none"> <li>○ Tenure (Market/Social Rent/ Affordable Rent/Shared Ownership)</li> <li>○ Dwelling mix (1-bed, 2-bed, 3-bed, 4-bed +)</li> </ul> </li> </ul>
<p>5. Phasing</p> <ul style="list-style-type: none"> <li>• 1:1000 illustrative phasing plan</li> <li>• Indicative phasing programme against District Plan periods:               <ul style="list-style-type: none"> <li>○ 2011- 2016</li> <li>○ 2016 – 2021</li> <li>○ 20201- 2026</li> <li>○ 2026 – 2031</li> <li>○ 2031 - 2036</li> </ul> </li> <li>• Build-out rates assumptions (residential units per annum for each phase)</li> <li>• Any specific dependencies (e.g. mineral extraction)</li> </ul>
<p>6. Site specific <u>on-site</u> infrastructure &amp; scheme impact mitigation requirements. Itemised within tables to set out line by line what is required, when it is needed, how much it would cost and how would it be funded (for IDP). To include all:</p> <ul style="list-style-type: none"> <li>• Physical (Utilities and transport)</li> <li>• Social (Education, health, community)</li> <li>• Green (communal open space, publicly accessible open space, play space and SUDS)</li> </ul>
<p>7. Site-specific <u>off-site</u> Infrastructure &amp; scheme impact mitigation requirements: as above but to include necessary off site works related to the development:</p> <ul style="list-style-type: none"> <li>• Physical (Utilities and transport)</li> <li>• Social (Education, health, community)</li> </ul>

## District Plan Delivery Study Specification – 6.06.2014

### Key Site Deliverability Issues and Information Requirements

- Green (communal open space, publicly accessible open space, play space and SUDS)

8. Promoter baseline data for use in site-specific financial viability appraisal, to be provided in spreadsheet format and to set out starting point including following assumptions

- Floor areas by use (based on Concept Masterplan)
- Site preparation/scheme enabling costs
- Residential and non-residential build costs
- Residential and non-residential values
- Residential build-out/sales rates
- Affordable housing provision (Rent/shared ownership split and any review mechanism)
- Itemised on site infrastructure costs
- Itemised off site infrastructure costs
- Assumptions on public sector funding
- Developer's return
- Discount/finance rate
- CIL/s106 costs
- Professional fees/marketing costs etc.
- Uplift in values over time
- Cost Inflation
- Threshold land value & assembly costs
- Sensitivity analysis

9. Long-term management/maintenance arrangements: to enable consideration of scheme income flows or service charges as part of long term cost & cashflow

10. Anticipated Delivery & Financial Model: to clarify anticipated approach to site development (ie direct development, master developer role, direct disposal, etc) and approach to project financing to inform appropriate approach to cashflow modelling & appropriate finance rate.