

THE SHAPLEY HEATH GARDEN COMMUNITY OPPORTUNITY BOARD



DATE OF MEETING: 8 MARCH 2021

AGENDA ITEM: 1

TITLE OF REPORT: PROJECT AND COST PLANS

1 PURPOSE OF THE REPORT

- 1.1 To present the amended high level project plan and the associated cost plan for endorsement.

2 OFFICER RECOMMENDATION

- 2.1 The Board endorses the amended high level project plan and the associated cost plan.

3 BACKGROUND

- 3.1 The first Shapley Heath Garden Community Opportunity Board (SHGCOB) took place in February 2020. Shortly afterwards, the COVID-19 pandemic took hold and Council resources were redeployed to manage the response and later recovery work. As a result, the planned quarterly SHGCOB meetings for 2020 were cancelled.
- 3.2 The short and long-term effects of the pandemic are yet to be fully understood/realised, however the Council undertook a survey in the summer of 2020 (COVID-19 Survey) to determine the immediate impact of the pandemic on its residents and local businesses to assist in its response but also to help understand what this could mean for communities in the future. The effects of the pandemic on communities and its consequences will be added to the scope of considerations for this project.

4 THE PROJECT PLAN (HIGH LEVEL)

- 4.1 The timetable to investigate the opportunity for a new garden community at Shapley Heath remains largely unchanged despite the COVID-19 pandemic. Working with the site promoters, we have been able to make adjustments throughout Phase One to compensate for much of the disruption caused. The resulting knock-on impacts in Phase Two would have taken Phase 2d into the pre-election period for 2023 and therefore the evaluation stage has been extended to allow Cabinet to make a decision outside of this period.
- 4.2 The high-level Project Plan below confirms that we have made significant progress on the first phase of the project, the Concept Phase, which is due to conclude in February 2022. The second phase to conclude in Mid-2023.

Phases		Timeframe	Estimated Date
PHASE ONE: Concept Phase	Phase 1a: Consultation and Visioning	24 months 14 months	January 2020 – December 2021 January 2021 – February 2022
	Phase 1b: Evidence Base	22 months 13 months	January 2020 – October 2021 January 2021 – January 2022
	Phase 1c: Viability	22 months 10 months	January 2020 – October 2021 March – December 2021
	Phase 1d: Evaluation	2 months	November – December 2021 January – February 2022
Stage Gate: Decision to progress to Phase Two			
PHASE TWO: Design Phase	Phase 2a: Consultation	12 months 16 months	January 2022 – December 2022 March 2022 – June 2023
	Phase 2b: Prospectus Documents	10 months	January – October 2022 March – December 2022
	Phase 2c: Viability	12 months	January – December 2022 March 2022 – February 2023
	Phase 2d: Evaluation	2 months 4 months	January – February 2023 March – June 2023
Conclusion of the Project			

~~Strikethrough~~ – Dates previously presented to the Opportunity Board

- 4.3 The key activities in Phase One are identified in the timetable below including the Stakeholders (Thematic/Steering Groups) and Landowners Forum and the Opportunity Board meeting dates:

Mid-Level Project Plan: Phase One – Key Activities 2021-22	
January 2021	Establish the Community Forum (Thematic/Steering Groups)
February	Establish the Landowners Forum
March	Second meeting of the Shapley Heath Garden Community Opportunity Board
April	Establish the Garden Community Website
May	Conduct the Communities Survey Second Community Forum (Thematic/Steering Groups) and Landowners Forum
June	Conduct the Communities Survey
July	Third meeting of the Shapley Heath Garden Community Opportunity Board Publish the Vision and Objectives
August	Publish the Communication and Engagement Strategy
September	Third Community Forum (Thematic/Steering Groups) and

	Landowners Forum
October	Fourth meeting of the Shapley Heath Garden Community Opportunity Board Baseline Studies complete and published
November	Fourth Community Forum (Thematic/Steering Groups) and Landowners Forum
December	Publish the Phase One Masterplan (Concept) Publish the Strategic Viability Appraisal
January 2022	Strategic Reports complete and published
February	Fifth Community Forum (Thematic/Steering Groups) and Landowners Forum Fifth meeting of the Shapley Heath Garden Community Opportunity Board

- 4.4 Given that over a year has passed since the last Opportunity Board and there are four new members to the Board (representatives from the Landowners and Stakeholders Forums), the key activities for Phase One are rehearsed within this paper.
- 4.5 As discussed in **Agenda Item 2**, the Stakeholders and Landowners Forums have been established and will provide a key engagement platform for this project. The draft Communication and Engagement Strategy (**Agenda Item 3**) outlines other methods for communication and engagement, including a purpose-built website for the project which is currently underway. Please see **Agenda Item 4** for more details on the website and associated branding.
- 4.6 The vision and objectives of the Shapley Heath Garden Community will be informed by comprehensive public engagement, which will include a Communities Survey (a detailed survey of the district's residents to establish the principles of successful and vibrant communities). Please see **Agenda Item 5** for more details. The vision and objectives will set the parameters in which to explore the opportunity for a new Garden Community and will form the baseline for evaluating the outcomes at the end of Phases One and Two.
- 4.7 During Phase One, a number of background studies and strategic reports will be undertaken. Please see **Agenda Item 6** for more details. These studies will provide a comprehensive evidence base, which will inform a concept masterplan. The concept masterplan will identify land which could be developed and land which could not. It will also provide a broad indication of where the different land-uses might go. A high-level viability assessment will also be undertaken to determine the affordability of the options proposed. The concept masterplan and viability assessment will test whether in principle a new garden community would be viable and deliverable.
- 4.8 At the end of phase one, based on the vision and objectives and the evidence base, the Opportunity Board will be able to evaluate whether to proceed to Phase Two.
- 4.9 Subject to agreement to proceed, Phase Two is the design phase. The evidence collected in phase one will inform the prospectus documents. This

library of documents will provide a place making toolkit. The Opportunity Board will evaluate whether the prospectus is able to realise the vision and objectives established at the beginning of this project.

- 4.10 Sitting behind this high-level project plan is a detailed project plan, which is reviewed regularly by Homes England as part of the MHCLG's Garden Communities Program.
- 4.11 The mid-level project plan will be updated ahead of every board meeting highlighting key activities over the phase and progress to date.

5 THE SPEND PLAN (HIGH LEVEL)

- 5.1 Details on the spend plan will follow shortly.

APPENDICES

Appendix 1 Tripartite Agreement

Appendix 2 Garden Communities Capacity Funding Bid Form – September 2020

Appendix 1
Tripartite Agreement

DATED: February 2021

SHAPLEY HEATH COLLABORATION AGREEMENT:

HART DISTRICT COUNCIL

and

L&Q ESTATES LIMITED

and

LIGHTWOOD LAND LIMITED

RELATING TO EXPLORING THE OPPORTUNITY FOR A
GARDEN COMMUNITY AT SHAPLEY HEATH

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THIS AGREEMENT is dated

February 2021

BETWEEN

- (i) **HART DISTRICT COUNCIL** of Civic Offices, Harlington Way, Fleet, Hampshire GU51 4AE ('the Council');
 - (ii) **L&Q ESTATES LIMITED** (Company Number 11800258) whose registered office is at Gallagher House Gallagher Way, Gallagher Business Park, Warwick, CV34 6AF ('L&Q'); and
 - (iii) **LIGHTWOOD LAND LIMITED** (Company Number 09297434) whose registered office is at 4 Carlos Place, London, W1K 3AW ('Lightwood')
- (together 'the Parties' and "Party" shall be construed accordingly)

1. Background and Introduction

- 1.1 It was announced in June 2019 that Hart District Council would be part of the Ministry of Housing, Community and Local Government (MHCLG) Garden Community Programme.
- 1.2 This is an agreement to establish a framework for the collaborative working between the Council, L&Q and Lightwood to assist and support the MHCLG Garden Community Programme to explore the opportunity to create a new Garden Community at Shapley Heath ('the Project').
- 1.3 The Parties acknowledge that this Agreement can be extended to include other interested parties should other interested parties take an interest in the Project.
- 1.4 The Council, at its meetings of 7th November 2019 and 2nd January 2020, approved the strategic approach to take forward the Project, which was then subsequently approved by the Shapley Heath Garden Community Opportunities Board (SHGCOB) on 17th February 2020. The Project is agreed to be based on:
 - i. the key principles set out at Appendix A – Item 6;
 - ii. the governance structure set out at Appendix A – Item 3;
 - iii. the funding structure set out at Appendix A – Item 7 and 8; and
 - iv. the strategic project plan set out at Appendix A – Item 8;

2. Vision/Aspirations

- 2.1 To flexibly and creatively work together on wide-ranging innovative place making/shaping agenda to test the Shapley Heath Garden Community opportunity for future growth option.
- 2.2 The Parties agree that the MHCLG principles (as set out in Appendix A- Item 6), as adopted by the Council, will be used as the overarching principles for the Project.

3. Aims and Objectives

3.1 The objectives of this Agreement are to facilitate:

- (i) the promotion of a collaborative working approach to exploring the opportunity for the Project;
- (ii) a shared commitment to a timetable endorsed by the SHGCOB;
- (iii) contribution to a project plan with clearly defined and achievable milestones, which is endorsed by the SHGCOB;
- (iv) contribution to the development of a vision and objectives, which is endorsed by the SHGCOB;
- (v) bringing together the evidence, expertise and views of all work streams to provide a holistic view of the opportunities for the Project;
- (vi) the investigation as to how a characterful and distinctive community can be achieved that meets the vision and objectives of the Project;
- (vii) the provision, where able, of expertise and resource in other aspects of the Project such as communication and engagement, marketing and graphic design;
- (viii) participation in the Landowner Forum and where appropriate the SHGCOB recommendations on the prioritisation of activities, resources and projects;
- (ix) the raising of concerns and help to find solutions;
- (x) assistance in any bids for additional funding, including where able offering up resources; and
- (xi) making every effort to prioritise attendance at scheduled meetings but to ensure to ensure that a suitably senior substitute is nominated from the same organisation

4 Funding Infrastructure

- 4.1 To explore how development and each and every part thereof fairly and reasonably contributes to the cost of infrastructure, facilities, legacy arrangements and other measures needed to support delivery of a sustainable garden community.

5 Timetable and Milestones

- 5.1 Where appropriate and agreed, Hart, Lightwood and L&Q can fast track the work streams identified in clause 7, providing the resources and funding are made available, to influence the time frames set out below (the Timetable):

Estimated Date	Timeframe	Task
January 2020 – December 2021	24 months	Phase 1a: Consultation and Visioning
January 2020 – October 2021	22 months	Phase 1b: Technical Studies
January 2020 – October 2021	22 months	Phase 1c: Viability
November - December 2021	2 months	Phase 1d: Evaluation
January – December 2022	12 months	Phase 2a: Consultation
January – October 2022	10 months	Phase 2b: Prospectus Documents
January – December 2022	12 months	Phase 2c: Viability
January – February 2023	2 months	Phase 2d: Evaluation

5.2 The Timetable can be amended, if required, with the written agreement of all parties. It will be sufficient for any such amendment to be confirmed via email and reported to the next SHGCOB agenda for reference.

6. Local Plan

6.1 The Council adopted the Hart Local Plan (Strategy and Sites) 2032 in April 2020.

6.2 Para 33 of the National Planning Policy Frameworks (February 2019) states policies in local plans and spatial development strategies should be reviewed to assess whether they need updating at least once every five years, and should then be updated as necessary. Reviews should be completed no later than five years from the adoption date of a plan, and should take into account changing circumstances affecting the area, or any relevant changes in national policy. Relevant strategic policies will need updating at least once every five years if their applicable local housing need figure has changed significantly; and they are likely to require earlier review if local housing need is expected to change significantly in the near future

6.3 The Council will review the Hart Local Plan 2032 at least once every five years to assess whether the policies need updating, and as appropriate then be updated as necessary. This first such review will be completed no later than April 2025.

7. Deliverables

7.1 The SHGCOB shall determine the deliverables for the Project, together with any associated timescales, cost approvals and which Party will undertake the work. The deliverables will include the following:

- (i) Completion of a suite of defined baseline studies
- (ii) Completion of a suite of strategy reports
- (iii) Preparation of a Masterplan
- (iv) Preparation of a Garden Village Prospectus

8. Procurement

8.1 Where appropriate and agreed, L&Q and Lightwood agree to procure and fund (in part or whole) the following streams of work:

	Baseline Surveys/Studies/Topics
1	Topographical Survey and Ground Survey
2	Transport
3	Landscape/Local Gaps
4	Agricultural Land Classification
5	Heritage
6	Flood Risk Assessment
7	Water Cycle/Management
8	Drainage Strategy
9	Utilities
10	Air Quality
11	Noise
12	Contamination
13	Ecological Impact Assessment
14	Woodland, Trees and Hedgerows

8.2 Where the Council contributes towards the cost of any commissioned work stream, L&Q and/or Lightwood shall ensure that the procurement and contract award in connection with such work streams complies with the principles of the EU Public Procurement Rules, where applicable.

8.3 The Party commissioning any works or services in accordance with clause 8.1 shall ensure that the terms and conditions of the relevant contract with the supplier provides for (i) any intellectual property rights in any materials created pursuant to such contract to be for the benefit of all of the Parties with full title guarantee, all legal and beneficial rights, title and interest; or (ii) all of the parties of this Agreement to be granted a limited, revocable, non-assignable, worldwide, royalty-free, non-exclusive licence to use the materials for any purpose in connection with the Project, without limitation as to time or duration.

9. Dispute and Resolution

9.1 In the unlikely instance of a dispute arising between officers of the Council and representatives of L&Q and Lightwood, the Project Lead, Christine Tetlow, (or as may be substituted by SHGCOB) would attempt to facilitate a resolution. Should the dispute not be resolved at this point it would be escalated to the Project Sponsor, Patricia Hughes (or as may be substituted by SHGCOB) and the Managing Directors of L & Q and Lightwood.

9.2 If the dispute cannot be resolved pursuant to clause 9.1 above, a meeting will be called of all parties to seek resolution, to be signed off at the end of that meeting. If a solution cannot be found, the matter will then be escalated to SHGCOB for final determination.

10. Data Protection, Confidentiality and Freedom of Information

10.1 All parties are obliged to comply with data protection legislation as it applies in the UK, covering the General Data Protection Regulation (GDPR), tailored by the Data Protection Act 2018.

- 10.2 This Agreement and all baseline studies, strategic reports and documents which will make up the Shapley Heath Prospectus will not be maintained in secrecy. All information will be made available for public inspection, unless it is confirmed in writing that the information provided is commercially sensitive.
- 10.3 If the Council receives a request, under the Freedom of Information Act (FOI) or Environmental Information Regulations (EIR), to disclose information relating to this project, they are obliged to do so unless the information is deemed exempt under the Act. L&Q and Lightwood will, where requested to do so in writing, promptly and fully assist and cooperate with the Council to enable the Council to comply with its obligations in respect of those requirements. Provided always that nothing herein shall require L&Q or Lightwood to disclose information in documentation relating to its interests in land which are the subject of obligations of confidentiality. Further information can be obtained from: <https://www.hart.gov.uk/button/freedom-information>

11. Communications and PR

- 11.1 The Council will be primarily responsible for providing local communication for all matters relating to this Agreement.
- 11.2 Where communications affect the other parties and/or other stakeholders, they will be considered and agreed by SHGCOB in order that appropriate arrangements and/or a protocol can be agreed and adopted.

12. Acceptance of Collaboration Agreement

- 12.1 The parties are committed to the principle of collaborative working, undertaking the necessary tasks as outlined in this document according to the timetable established unless otherwise agreed subsequently between the parties.
- 12.2 This Agreement will not fetter the Council in exercising its statutory duties as local planning authority. This collaboration agreement does not give a guarantee that the site will be considered in any review of the Local Plan, new Local Plan, DPD or SPD or guarantees any Local Government consents will be granted.
- 12.3 Nothing in this Agreement shall restrict or prohibit L&Q and Lightwood from exercising their right of appeal under the relevant Planning Acts or to apply for judicial review.

13. Term and Termination

- 13.1 This Agreement is effective from the date on which it is signed by all parties and shall remain in force until:
- (i) the Garden Village Prospectus including masterplan(s) has been finalised and adopted by the Council; or
 - (ii) any date on which the parties agree that no further work is required to be carried out under the provisions of this Agreement.

- 13.2 A six-monthly review of progress of the collaborative agreement service standards and standard of customer care will be undertaken by the Project Sponsor in consultation with L&Q and Lightwood. If agreed, adjustments to this Agreement can be made in writing in the light of that review.
- 13.3 L&Q and Lightwood may at any time and at their own discretion withdraw from and terminate their participation in this Agreement.
- 13.4 Should either L&Q or Lightwood dispose of their land interests in the Shapley Heath Garden Village Programme, this Agreement shall remain effective with the remaining parties.
- 13.5 The Council may at any time and at its own discretion terminate this Agreement by giving not less than 21 days' notice in writing to the other Parties that it intends to terminate this Agreement.
14. **Governing Law**
- 14.1 This Agreement and any dispute or claim arising out of or in connection with it or its subject matter or formation (including non-contractual disputes or claims) shall be governed by and construed in accordance with the Law of England and Wales.

Signed by
HART DISTRICT COUNCIL



Authorised Signatory

Printed Name: GRHAM COCKRILL

Date: 22/02/21

ST MK GC

L & Q ESTATES LIMITED



Authorised Signatory

Printed Name: MARTIN R. RICHMOND

Date: 03 FEB 2021

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LIGHTWOOD LAND LIMITED

A handwritten signature in black ink, appearing to be 'J. Turner', written over a horizontal line. The signature is stylized and extends to the right.

Authorised Signatory

Printed Name: J. Turner

Date:

md.
GC

APPENDIX A

THE SHAPLEY HEATH GARDEN COMMUNITY OPPORTUNITY BOARD - 17 February 2020

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Appendix 2

Garden Communities Capacity Funding Bid Form – September 2020

Date: 2 September 2020
Our Ref: PH/saw
Email Address: chiefexecutive@hart.gov.uk
Direct Line: 01252 774450



Hart District Council,
Harlington Way,
Fleet, Hampshire
GU51 4AE

Telephone: 01252 622122
www.hart.gov.uk
DX: 32632 FLEET

Ms Fionnuala Lennon
Head of Garden Communities
High Growth & New Settlements
Homes England

Dear Fionnuala

Invitation for local authorities to bid for Garden Village and Town Capacity Funding 2020-21 – supplementary information

Further to the recent launch of the above capacity funding invitation, this letter provides additional commentary in support of the Shapley Heath Garden Community bid, which aims to deliver an attractive and sustainable community which is both an exemplar of great design and also of innovation.

Progress to date

Our focus so far has demonstrably been in the creation of solid foundations which will provide clear and transparent decision making, for the delivery of a Garden Community, as well as building on our ethos and commitment for effective engagement with the communities that Shapley Heath will serve.

We have in place a Strategic Board with active participation from key players from across all stakeholders, pivotal to the delivery of a Garden Community. Our place making approach is building with district wide feedback on what communities and homes may look like in the future. Covid-19 could have a real impact on what our communities look like in the future and we are taking this opportunity to explore how this could influence our innovation.

As part of this, we are part of a major infrastructure project to deliver the 'fibre spine' via the Gigabit EM3 Town and Rural Project working collaboratively with eight local authorities (two counties) and the M3 Enterprise Partnership.

This brilliant opportunity, funded by the Getting Building Fund (GBF) for investment in local, shovel-ready infrastructure projects, aims to stimulate jobs and support economic recovery across the country for Hampshire and Surrey and to take a big stride towards ultra-fast broadband, with a multi-million pound programme to deploy gigabit-capable fibre – and will be coming through Shapley Heath.

We're confident that, whilst some aspects of the Shapley Heath Garden Community project, has slipped due to the pandemic, we continue to work to the original ambitious timescale, which we can deliver against.

Place Making

Shapley Heath needs to be a really special place in order to truly deliver on the Garden Communities principles, so we are working to the following ethos built into the DNA of our approach and have recently agreed a tripartite agreement between the major stakeholders that will ensure

- An empowered local community from the outset, with a strong vision and collaborative engagement between all parties;
- Delivering high-quality design, layout and mix of tenures and types in both housing and employment provision, exploring innovative approaches, with supporting community facilities and infrastructure;
- Landscape led development, with harmonious integration with the wider countryside, lakes, rivers and canal; promoting healthy living and wellbeing through plentiful opportunities for recreation;
- A community that is self-sustaining, with all the key services on site, reducing the need to travel, increasing social connectivity and community wellbeing;
- A community well connected to and from higher-order settlements via Hart's Green Grid, walkable, cyclable spaces and places to provide true connectivity across the district and beyond;
- Ensuring a robust technical approach to deliverability and viability, ensuring optimum land value capture, recycled for the benefit of the community;
- Enabling an enterprising community, with structured long-term stewardship and management to ensure longevity and resilience of the GV principles.

The above ethos will underpin the commitment of Hart District Council and developers/promoters in developing and testing proposals for Shapley Heath Garden Community, through a formal engagement and collaboration structure to ensure continued close working.

Use of Previous Funds

We recognise the importance of an ambitious but deliverable Garden Community proposal, which is realistic and can be brought forward promptly, achieving viable, tangible benefits. We have appointed a team who are working to an ambitious programme seeking early delivery of a GV development. Whilst understandably, some of the technical surveys have slipped due to Covid-19, it is key to note that the overall timescale for delivery remains very much as anticipated.

All previous funds have been spent or committed and we have made great progress in the milestones within our project plan. We will continue to build on the solid foundations created by this spend to take the Garden Community on to the next ambitious stages.

This funding bid, if successful, would enable the jointly committed Council and Developer and Promoter to leverage the opportunities that the site present to achieve a special and distinct quality of place, putting in the necessary mechanisms to ensure that these and the Garden Community ethos are developed further and faster, drawing on expertise from the best-in-class.

Securing Garden Community Quality and Innovation Outcomes

Our site has unique characteristics and opportunities to support a Garden Community, specifically in this location, which can be summarised as:

- **Landscape led** - the site is made of attractive Hampshire countryside, comprising undulating open farmland, a small rural village and the setting of heritage assets, which can be enhanced and respected to form a beautiful integrated landscape setting, defining the landscape character throughout the GV.
- **The right scale** - the site is large enough to provide all the homes set out in our bid document, as well as generous landscaping and Suitable Alternative Natural Greenspace provision, which could provide benefits beyond the site, with 'working land' which could assist towards a self-sustaining community. This type of scale supports the range of important community and social infrastructure required to create an inclusive and cohesive community;
- **The right location** - well located in relation to higher-order settlements with services and facilities, including public transport hubs, whilst situated in a rural setting, completing a string of small villages and settlements in the area. In this regard, it fits into the spatial pattern of settlements in this location. The site, located centrally in the district, offers enhanced connectivity to Hart's other settlements and services through the Green Grid, which will provide sustainable modes of transport for commuting, leisure and recreation trips across the district;
- **Creation of new economic role** - the area performs an economic function, broadly through agriculture, the garden village provides opportunities for important new expansion and diversification of the economic scope and scale within the area. This is supported by the ambitious 'Fibre Spine' project which we are working collaboratively on with Enterprise M3 Partnership. The project will deliver a gigabit fibre spine between Guildford and Basingstoke, incorporating Shapley Heath Garden Community, as well as other towns and villages within the Hart District. This digital advantage will be weaved throughout the fabric of the village, creating future-proofed homes, businesses, public buildings and spaces.

These unique site attributes set the platform for a high-quality Garden Community development, incorporating high standards of design, exemplar sustainability and inclusion of innovative approaches to financially accessible housing and employment provision, flexible working and imbedded technology and communications.

Project Management

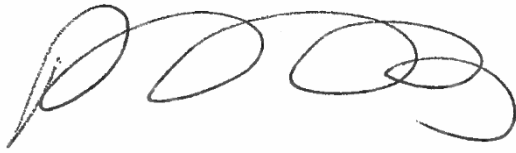
The Key Milestones (Appendix 1) attached to our bid confirm that the overall timetable to investigate the opportunity for a new garden community at Shapley Heath remains largely unchanged following the COVID-19 pandemic. Working with the site promoters, we have been able to make adjustments throughout the phases to compensate for much of the disruption caused.

The Project Plan (Appendix 3) identifies the key activities proposed in 2020-21 in relation to our capacity funding request. The Project Plan confirms that, with capacity funding, we will be able to make significant progress and will be on track to conclude the first phase of the project, the Concept Phase, by the end of 2021. Without funding, this timetable will slip considerably and there is a risk that some studies/reports will not be undertaken. The capacity funding therefore adds

significant value both in terms of accelerating the project plan and the quality of the outcomes.

Shapley Heath Garden Community is unique in many respects, not least for its main line railway station providing direct access into London Waterloo, but its ability to create a genuine modal shift not only for the new village, but potentially the whole district. The potential for green infrastructure and a step change in the quality of lifetime homes means that it would become a significant asset for Hart District and north Hampshire.

Yours sincerely

A handwritten signature in black ink, consisting of a series of loops and curves, positioned above the printed name.

Patricia Hughes
Joint Chief Executive

Homes England

Garden Communities Capacity Funding Bidding Form 2020/21

1 Name of Garden Town / Village

Shapley Heath Garden Village

2 Local Authority/ies Name

a Hart District Council

b

c

d

3 Local Authority Key Contact details for bid

Name

Telephone Number

Email Address

a Christine Tetlow

b

4 Confirm total number of homes to be delivered in your garden town or village

Up to 5,000

5 Set out below the key project milestones to start on site; highlight any slippage from previous milestones giving reasons for slippage & describe measures you are taking to mitigate the slippage (highlight where covid-19 has had a specific impact on delivery timetable)

The overall timetable to investigate the opportunity for a new garden community at Shapley Heath remains largely unchanged following the COVID-19 pandemic. We have been able to make adjustments throughout the phases to compensate for much of the disruption caused - Please see Appendix 1 'Key Project Milestones'.

Disruption occurred for two reasons; not being able to hold public meetings and businesses/consultancies struggling to adapt during lockdown.

The lockdown prevented any meetings, including public meetings, from taking place and this meant that we could not run our inaugural Stakeholders and Landowners Forums. The aims of the inaugural meetings were to establish an agreed procedure and attendance for future meetings to ensure that, given the large number and diversity of the groups, representation could be made in a clear and efficient manner. We considered that holding an on-line meeting of this scale with an unestablished group would not deliver the results that we would like and potentially risked alienating key voices unable to effectively communicate. We had hoped that if we delayed until Autumn 2020, we would be able to hold the meeting. As this however is still looking unlikely we are now planning to undertake the inaugural meetings on-line by breaking down the two forums into a number of smaller groups, which will be held throughout October 2020. To compensate for the delays, future forums will occur more frequently to ensure that sufficient engagement has been undertaken in Phase 1.

The lockdown meant that many of the baseline surveys that had been procured were delayed, due to staffing issues or the physical environment was unsuited, for example significant reductions in traffic which had implications for highways studies. The original timetable allowed a year to undertake the studies, which took into consideration seasonal restrictions as well as longer lead studies, such as highways. This delay will in part be mitigated by the flexibility in the timetable and by running longer-lead studies in parallel with later activities in Phase 1.

6 Expenditure of capacity funding received previously

a Specify below the amount of capacity funding received in 2019/20 plus any underspend from previous years where relevant

Funding received 2019/20	£150,000
Underspend from pre-2019/20 funding	£0

b Specify below the expenditure by category for the funding received in 2019/20 (& any underspend from previous years) & highlight if funding has been Expended, Committed (where work has been formally commissioned/contracted) or Proposed (work/activity is identified in a project plan but not currently commissioned or contracted) at this point:

Category	Activity or use	Impact on delivery of garden community (e.g., accelerating achieving a milestone, improving quality, innovation)	Amount	E/C/P
Staff resource (please specify purpose, e.g. project management)	<p>Two new roles within the Council have been created to provide the essential skills and additional capacity required to support this project:</p> <ul style="list-style-type: none"> - Project Support Officer - Communication and Engagement Officer <p>The Council is also making a significant contribution to staffing resources for the Garden Community Team, including dedicating considerable Chief Executive time.</p>	<p>We had to delay recruitment due to COVID-19 and a subsequent reorganisation of the Council's HR team. We are now out to market for both roles, which are particularly critical to accelerating delivery of Phase 1a - 'Consultation and Visioning' and providing enhanced communication and engagement with our residents/key stakeholders. Without both of these roles, the Council's Garden Community Team would have limited capacity and the pace of the project would slow down considerably and many of the Garden Community principles risk not being embedded into the DNA of the project.</p>	£92,069	c
ii Masterplanning & design	<p>Consultants provided advice regarding branding to be used throughout the Garden Community project to create a sense of identity. This sense of identity will be critical to enhance the ongoing engagement with residents and key stakeholders as the project develops.</p>	<p>Branding and creating a sense of identity will significantly improve consultation activities and increase the Council's ability to engage with a wider audience.</p>	£0	
iii Technical studies including infrastructure, transport, etc	<p>The following baseline studies are currently being undertaken, commissioned and funded by the Garden Community's two promoters in accordance with the approval of the Shapley Heath Opportunity Board and the Tripartite Agreement, and will be completed by November 2021:</p> <ul style="list-style-type: none"> - Topographical Survey and Ground Survey - Transport - Landscape - Agricultural Land Classification - Heritage - Flooding 	<p>The baseline studies will provide a rich and comprehensive evidence base, which will inform both the first and second stage of this project (Concept Phase and Design Phase, See Appendix 1 - Key Milestones). Without these studies, decisions would be made without the benefit of evidence and therefore may not stand up to future scrutiny, compromising the integrity of the project.</p>	£0	

	<ul style="list-style-type: none"> - Drainage - Water Cycle/Management - Utilities - Air Quality - Noise - Contamination - Ecology/Biodiversity - Woodland, Trees and Hedgerows 				
iv	Engagement & communication	<p>Our communications/engagement consultants are currently undertaking the following community and engagement activities:</p> <ul style="list-style-type: none"> - COVID-19 Survey and Place Survey - Comprehensive Communication and Engagement Strategy - Website Strategy (Post COVID-19) - Setting up the Community Forum <p>Presentation by Lord Taylor of Goss More to Ward and Parish Cllrs regarding the merits of garden communities.</p>	<p>Consultants were procured to accelerate the set-up of Phase 1a - 'Consultation and Engagement' in advance of the recruitment of an Engagement and Communication Officer. This programme of works has been delayed as a result of COVID-19, particularly the work which involved setting up large community/stakeholder meetings. We have revised the scope of these meetings, towards smaller on-line discussion groups, which will begin in October. This work is critical to ensure that we engage and consult with our key stakeholders/residents effectively.</p> <p>Lord Taylor of Goss More presented his experience regarding garden communities (and large scale developments) to our Ward and Parish Councillors. This was a critical first step to introduce our members to the opportunities a Garden Community can provide and received good feedback from members.</p>	<p>£46,637</p>	<p>£</p>
v	Legal or finance	<p>Strategic conversations with neighbouring Garden Community projects has secured a knowledge base to underpin the legal and finance elements of the project plan. To date, all expenditure regarding legal/finance have been covered by the Council.</p>	<p>Strategic conversations with neighbouring Garden Community projects has secured a knowledge base to underpin the legal and finance elements of the project plan.</p>	<p>£0</p>	
vi	Viability	<p>Strategic conversations with viability consultants and neighbouring Garden Community projects has secured a knowledge base to underpin the viability elements of the project plan. To date, all expenditure regarding viability has been covered by the Council.</p>	<p>Strategic conversations with viability consultants and neighbouring Garden Community projects has secured a knowledge base to underpin the viability elements of the project plan. Early understanding of the viability of the site and the potential uplift available will be critical to realising the full potential of the Garden Community.</p>	<p>£0</p>	

vii	Work on delivery models or mechanisms	Procurement of consultants to explore options for delivery with the Council and the promoters. We are actively exploring all suitable delivery mechanism, including the master developer approach, to ensure that best practice is incorporated into the fabric of the project.	We have chosen to progress conversations around delivery extremely early in the process in order to help inform later decisions. These conversations also benefit the promoters and strengths the working relationship between the parties.	£10,400	c
viii	Innovation	Strategic conversations with neighbouring universities has secured a knowledge base to underpin the innovation elements of the project plan. To date, all expenditure regarding innovation has been covered by the Council.	Strategic conversations with neighbouring universities has highlighted a network to undertake cross departmental/cross university collaboration required for the next stage of the project.	£0	
ix	Other (please specify)			£0	
Total				£149,106	

7 Total amount of capacity funding you are bidding for in 2020/21

£406,149

8 Set out your bid for capacity funding 2020/21 using the following headings & highlighting the costs associated with each aspect & the expected outcomes

Category	Activity or use	Expected Outcome	Estimated Cost
i Staff resource (please specify)	On-going funding for the two newly created roles to provide the essential skills and additional capacity within the Council required to support this project: - Project Support Officer - Communication and Engagement Officer	The two newly created roles (from the 2019/2020 capacity funding) are critical to accelerating delivery of Phase 1a - 'Consultation and Visioning' and providing enhanced communication and engagement with our residents/key stakeholders. Without both of these roles, the Council's Garden Community Team would have limited capacity and the pace of the project would slow down considerably and many of the Garden Community principles risk not being embedded into the DNA of the project.	£151,149

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Creation of a new role within the Council to provide key viability expertise:
- Land Manager (part time or secondment from external agency for 2/3 days a week)

The new Land Manager role will provide the Council with additional professional knowledge and resource which will help enable the viability phases of the Garden Community. It will allow the Council to both work collaboratively with the promoters and developers whilst challenging assumptions regarding viability with a view to ensuring the Garden Community can provide beautiful and brilliant design and sustainable homes affordable to those who most need it. To support this approach the Council will be commissioning an economic evidence base, which will need to be analysed to ensure that the Council will be able to maximise the uplift in value from the site. It will also help provide a baseline of information for any future bids to the Enterprise M3 LEP or for HIF funding or any other streams of funding to ensure that Shapley Heath is not only built to a high design standard but has all of the infrastructure required for the delivery of a successful community, which people, young and old, can enjoy. The nature of the housing market, demand in the district and the greenfield designation of the site, creates a unique opportunity for the Council to ensure that the garden community benefits from a potentially significant uplift in value for the benefits of those living there. Without this new role, the opportunity to maximise the full benefits of the site may not be realised.

ii Masterplanning & design

Work continues iteratively on master planning and design. Large parts of this will be informed by the baseline surveys above, to completed by November 2021, and strategy reports outlined below, which will be delivered by this funding. With public and stakeholder engagement, this will set out a strong, bold and beautiful vision for the Garden Community. As outlined at our inception Shapley Heath Garden Community Opportunity Board, we will create a library of place making documents known as the Shapley Heath Prospectus, which will outline how the community could be planned, as well as confirming viability and deliverability. The Shapley Heath Prospectus will be underpinned by MHCLG's Garden Community principles and the Homes England Garden Communities toolkit, which will act as a golden thread that run throughout this project.

The Shapley Heath Prospectus, underpinned by a comprehensive suite of technical studies, would constitute an extremely advanced evidence base in the planning process, accelerating delivery at the later stages of the project. The engagement and consultation involved in every stage would also enhance the value of the prospectus as a community project.

£0

iii Technical studies including infrastructure, transport, etc

To undertake a number of bespoke strategy reports, which will shape the Shapley Heath Prospectus. Together these documents will outline how the new Garden Community could be planned with engagement from key stakeholders and our communities at every step. These reports, going beyond standard policy documents, will explore the art of the possible:

- Homes Strategy: Identifying leading concepts for low-carbon, age-friendly homes of the future, including modern and traditional building techniques.
- Employment Strategy: Working collaboratively with the Enterprise M3 Partnership, the strategy would review the economic opportunities within the functional economic geography, including the opportunity to develop a green innovation hub as well as the potential benefits of the ambitious 'Fibre Spine' project.
- Village Centre Strategy: Working with key stakeholders including civic leaders to create an environment which caters for the everyday social, health, leisure, business and shopping needs of a community in a post-pandemic world.
- Education Strategy: In partnership with Hampshire County Council, to create comprehensive education strategy, which identifies schools at the heart of the community.
- Green Infrastructure Strategy (including Community Facilities/Sports and Leisure/Play Space): Building on the best practice of the Healthy New Towns and the Hampshire Together Programme, and in light of recent and future pandemics, to create a comprehensive green infrastructure strategy which will run throughout the fabric of the new community. The Council's Green Grid will be instrumental in realising the shift change from cars to walking and cycling, and enhancing the green infrastructure offer.
- Health Needs, Health Impact and Active Lifestyles: Building on the best practice of the Healthy New Towns, establishing the health needs of our community to create a healthy place to live and work.
- Climate Change Mitigation Strategy and Renewable Energy Strategy: Bespoke strategies to create a sustainable, low-carbon community
- Innovation/Future Proofing - Transport/Technology and Lifestyle: In partnership with our local universities and leading businesses, identification of new and innovative options to incorporate into the community
- Urban Design/Place Stories and Branding: Two key reports balancing old and new, traditional and modern, which will inform the Shapley Heath Design Code

The identified strategy reports are fundamental to the masterplanning process, the creation of a design code and all future viability work. These reports, going beyond standard policy documents, will explore the art of the possible in a post COVID landscape. They will draw together best practice and contextualise exemplar specific to Shapley Heath. From these documents, informed decisions about quality, quantity and innovation can be made.

All of the strategy reports, with capacity funding, would be commissioned at the same time so that we could receive the bespoke strategies and be able to reach informed decision to progress to the next stage. Without funding, or only partial funding, these reports would need to be commissioned in smaller batches to manage the budget. This would significantly extend Phase One, as we would have to wait for all of the strategies, before beginning Phase Two, and there is a risk that some studies/reports are not undertaken. The capacity funding therefore adds significant value both in terms of accelerating the project plan and the quality of the outcomes.

£180,000

iv Engagement & communication

In line with the aspirations of the Planning White Paper, we would like to harness digital technology to make it much easier for our residents and key stakeholders to access and understand information related to our Garden Community and make it 'radically' easier to engage in the process. We therefore will create a fully interactive website which:

- Provides interaction between residents/key stakeholders with content that allows them to have a personalised experience, beyond the usual browsing and viewing.
- Provides a platform to share information, to undertake forums, collate responses in multiple formats, allow interaction between residents, key stakeholders and the Council
- Allows residents/key stakeholders to influence the vision and design of the Garden Community in a way that is tangible and breaks down barriers created by age or knowledge
- Includes a budget for visualisations that will be used in the website and in associated public engagement/consultation

COVID-19 has changed public consultation for the next six months to a year, and potentially longer. The Council undertook a survey at the peak of the lockdown to understand how effectively it could communicate with its residents online. The results suggested that provided the Council informs its residents of the initial on-line consultation using a variety of methods, including leaflets, on-line consultation can be a very useful tool to reach its residents. A website that is interactive will assist in overcoming the challenges posed by COVID-19 to ensure that the project can continue without prejudicing consultation or preventing residents/key stakeholders from being able to influence the project as well as realising the aspirations of the Planning White Paper. The website would also potentially be a very efficient way to communicate and record/capture feedback, thereby saving time and resources throughout the life of the project.

£60,000

v	Legal or finance	The Council will be able to resource legal/finance capacity in 2020/21, however it is likely that capacity funding will be required in the next bidding round.		£0
vi	Viability	Strengthening the case for a development of beautiful design, innovation, creativity and community, we will procure a Strategic Economic Outline Case and a high level viability assessment, which will show just what Shapley Heath can deliver in real terms.	Both assessments are critical pieces of evidence to begin the review of the viability of the site and the Council's understanding of the potential uplift available. The nature of the housing market, demand in the district and the greenfield designation of the site, creates a unique opportunity for the Council to ensure that the garden community benefits from a potentially significant uplift in value enabling the delivery of an affordable, sustainable and well-designed community that will go from strength to strength. The Economic Outline Case and subsequent high level viability assessment will set the scene and inform decisions regarding viability as well as help to create transparency and openness in the project.	£15,000
vii	Work on delivery models or mechanisms	Alongside the work on masterplanning and design, the approach for Shapley Heath is, at an early stage, to focus discussion around the delivery models and mechanisms. We have chosen to progress conversations around delivery extremely early in the process in order to help inform later decisions. We have funding set aside to continue to work on this with a view to an early report to the Shapley Heath Garden Community Opportunity Board on the options available and the best way to deliver high quality at speed.	We have chosen to progress conversations around delivery extremely early in the process in order to help inform later decisions. These conversations also benefit the promoters and strengths the working relationship between the parties.	£0
viii	Innovation	Shapley Heath has innovation built into its core DNA: - The Garden Community is focussed on a landscape led approach with significant amounts of both green and blue infrastructure. - The Council has already committed to a bold long term vision for the delivery of Hart's Green Grid, walkable spaces linking all major settlements across the district, encouraging safe and sustainable travel. Shapley Heath Garden Community is located at the very centre of our district and of this ambition. - Working collaboratively with the Enterprise M3 Partnership on the ambitious 'Fibre Spine' project to create a unique economic hub within the Garden Community - Working collaboratively with local universities to create a cross	Working collaboratively with the Enterprise M3 Partnership, local universities and businesses will create new opportunities to build innovation into the DNA of the Garden Community.	£0

departmental/cross university collaboration network to share ideas/innovations
- Innovation is also a key theme in the Shapley Heath Prospective and will identify new opportunities to incorporate into the new community

ix	Other (please specify, e.g. business planning or other work related to infrastructure delivery)			£0
Total				£406,149

9 Briefly describe what measures you have taken over the past year to secure quality outcomes in place-making & design of your garden town or village (e.g. policies, design tools, design review process)

The Council undertook a survey at the peak of the lockdown to understand how the COVID-19 pandemic was affecting our residents, specifically to identify changes, temporary and those more likely to be permanent, and how effective the Council's communication has been. The results of the survey, in tandem with a second survey planned in Autumn 2020, will be used to help shape the vision and objections of the Garden Community to ensure that the new community would be 'future proofed' against the effects of any future pandemics.

The COVID-19 survey has identified changes to commuting patterns, the opportunity to work from home and the ability to be able to work from home successfully, as well as changes to leisure, recreation and health and well-being. The second survey will look to establish how many of the identified changes are likely to be permanent, as well as exploring the key characteristics of a new community in a post-COVID world. Hart has historically been a commuting district, given its proximity to London and surrounding large towns/cities. A potential legacy of the pandemic maybe that residents are able to work from home and spent more time within the district. Place making and design will be central themes to explore how the new Garden Community could actively facilitate the new normal.

In addition to the survey, consultants have provided advice regarding branding to be used throughout the Garden Community project to create a sense of identity. This sense of identity will be critical to enhance the ongoing engagement with residents and key stakeholders as the project develops.

10 Briefly describe what measures you have taken over the past year to progress areas of innovation in your garden community (e.g. modern methods of construction, addressing health & well-being, integrated transport measures, use of technology, stewardship & delivery models, etc)

At the beginning of the year the Council undertook a workshop and survey to establish the key principles of the Hart's Green Grid. The consultation advocated the creation of routes between all settlements within the district. As well as connecting communities together, there is an opportunity to connect people to existing green spaces and other key destinations. Hart's Green Grid will therefore encourage walking and cycling as well as creating wider opportunities for active recreation and leisure, with potential benefits to health, local ecology and biodiversity.

Shapley Heath Garden Community is located within the heart of our district and the Green Grid will be at the heart of Shapley Heath. The Green Grid will be the primary source of access within the village and between all of our towns and villages in the district and as such will contribute to a significant opportunity for modal shift across the district.

Working in partnership with Hampshire County Council, the Green Grid will enable the resulting modal shift to be considered with greater confidence thereby reducing the dominance of roads and cars within the landscape of the village.

11 Highlight any small scale infrastructure projects that are part of your garden town or village that you intend delivering over the next year including related business case work and associated costs; and any business case work you intend to undertake this year relating to larger infrastructure projects.

Shapley Heath Garden Community is at the early stages and therefore no infrastructure projects can be delivered 2020/2021.

Checklist		
	Please make sure you have attached the following - confirm by entering a 'Y' in the Tick Box	Tick Box
12	<i>Have you included the latest version of the housing trajectory for your garden town or village?</i>	Y
13	<i>Have you included a project plan for you garden town or village covering key activities planned for 2020-21?</i>	Y

Please see Appendix 2

Please see Appendix 3

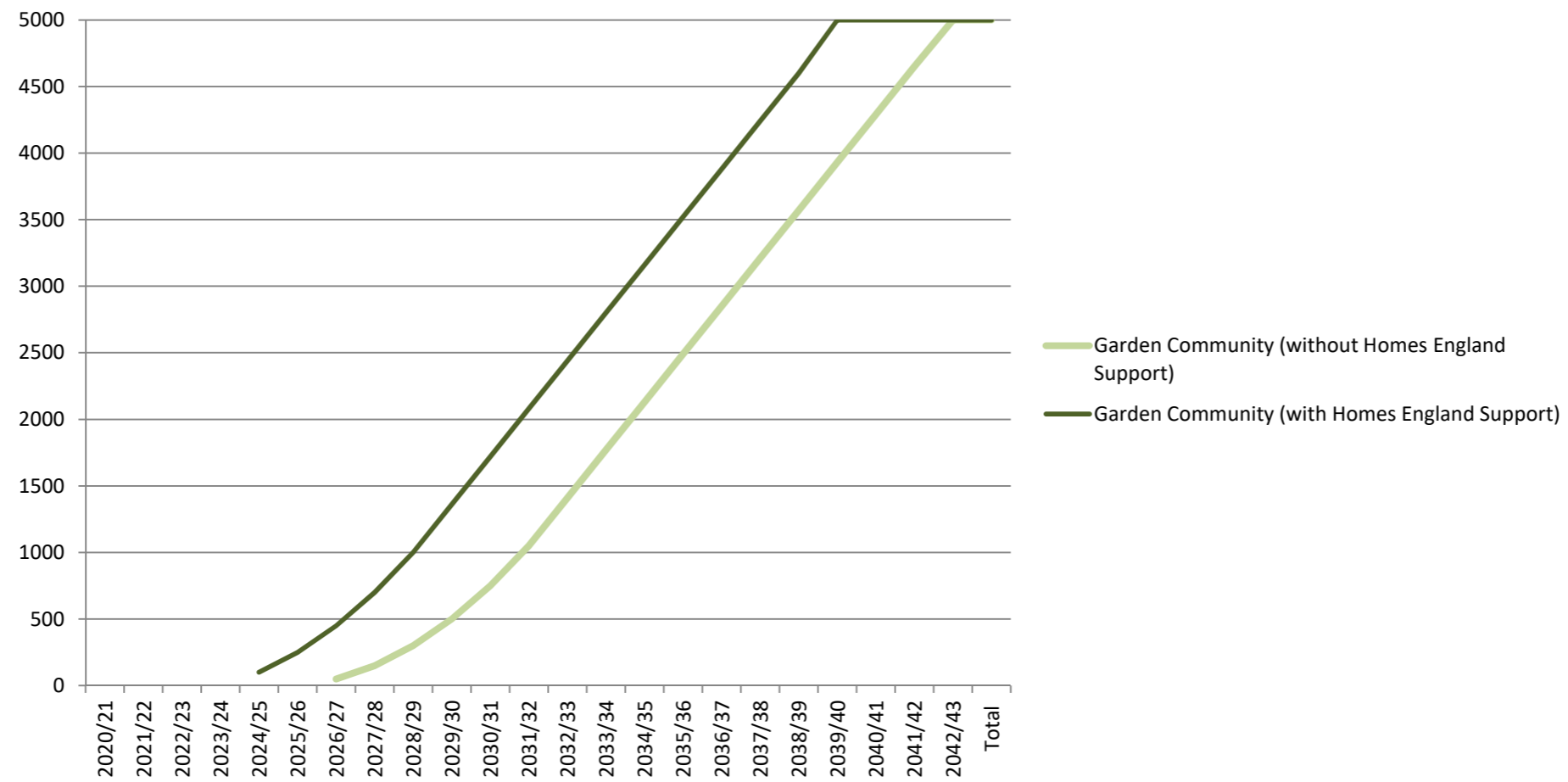
Appendix 1:

Key Project Milestones for Shapley Heath Garden Community (with Homes England Support)

Phases		Timeframe	Estimated Date
PHASE ONE: Concept Phase	Phase 1a: Consultation and Visioning	24 months	January 2020 – December 2021
	Phase 1b: Evidence Base	22 months	January 2020 – October 2021 January 2020 – November 2021
	Phase 1c: Viability	22 months	January 2020 – October 2021
	Phase 1d: Evaluation	2 months	November - December 2021
Stage Gate: Decision to progress to Phase Two			
PHASE TWO: Design Phase	Phase 2a: Consultation	12 months	January 2022 – December 2022
	Phase 2b: Prospectus Documents	10 months	January – October 2022
	Phase 2c: Viability	12 months	January – December 2022
	Phase 2d: Evaluation	2 months	January – February 2023
Stage Gate: Decision to progress to Phase Three			
PHASE THREE: Planning	Planning process	12 months	March 2023 – March 2024
PHASE FOUR: On site	On site development (infrastructure/housing)	Ongoing	2024/2025

Appendix 2: Housing Trajectory

	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	2039/40	2040/41	2041/42	2042/43	Total
Garden Community (without Homes England Support)							50	100	150	200	250	300	360	360	360	360	360	360	360	360	360	360	350	5000
Garden Community (with Homes England Support)					100	150	200	250	300	360	360	360	360	360	360	360	360	360	360	400				5000



Hart District Council - Shapley Heath Garden Community

Appendix 3 - Project Plan 2020/21



	Key Priorities and Work streams (identifying milestone, issue, barrier or opportunity being addressed)	Capacity Funding			Specific Milestones (including those expressed in bid to join the Garden Communities programme)	Deadline	Key Actions (including any tasks to be undertaken by Homes England)	RESPONSIBILITY	Progress (including project issues and risks)	R A G
		Funding Period	2019/2020	2020/2021						
PROJECT MANAGEMENT & RESOURCES	Recruit full time dedicated administrative support into the GC Team (New resource)	HE Funding	£38,700.00	£38,700.00	Appointment to the new administrative role (Garden Community Project Support Officer - Start date)	02/10/2020	Draft JD Undertake recruitment process including interviews	HDC GC Team	Completed At risk: No applicants applied. Given the job losses as a result of COVID-19, re-run the recruitment process. Advertising w/c 24/08/2020 At risk: If HE Capacity Funding Bid is unsuccessful, this post is at risk and the pace of the project will be impacted	G O
	Recruit full time dedicated senior role into the GC Team (New resource)	HE Funding	£53,367.00	£53,367.00	Appointment to the new senior officer role (Garden Community Engagement and Communications Officer - Start date)	02/10/2020	Draft JD Undertake recruitment process including interviews	HDC GC Team	Completed Revised programme due to COVID-19: Advertising w/c 24/08/2020 At risk: If HE Capacity Funding Bid is unsuccessful, this post is at risk and the pace of the project will be impacted	G O
	Recruit full time dedicated senior role into the GC Team (New resource)	HE Funding - Competitive Bid: Fees to be accrued 2020/2021	-	£59,080.50	Appointment to the new senior officer role (Garden Community Land Manager - Start date)	31/12/2020	Draft JD Undertake recruitment process including interviews	HDC GC Team	Completed Revised programme due to COVID-19: Advertising w/c 05/10/2020 At risk: If HE Capacity Funding Bid is unsuccessful, this post is at risk and the pace of the project will be impacted	G O
DELIVERABILITY (AFFORDABILITY and VIABILITY)	Establish what legal agreements in place for current land	-	-	-	Establish all relevant land and equalisation	17/02/2020	Set up a meeting with Homes England and promoter/developers	HE/ Joint C.Ex/ HDC GC Team	Completed	G
	Appoint consultant to provide ongoing surveying advice (land ownership/option agreements, equalisation, land values, etc.)	-	-	-	Appoint Consultant	13/01/2020	Draft procurement documents (brief etc.) Undertake procurement process (Internal process/HE process)		On track	G
	Appoint consultant to provide a Strategic Economic Outline Case	HE Funding - Competitive Bid: Fees to be accrued 2020/2022	-	£5,000.00	Appoint Consultant	20/11/2020	Draft procurement documents (brief etc.) Undertake procurement process (Internal process/HE process)		On track: Potential for delays due to CV19	G
	Draft the Strategic Economic Outline Case	See above	-	-	Publish the Strategic Economic Outline Case	TBC (Second SHGCOB meeting)	Instruct the consultant to produce the Strategic Economic Outline Case Sign off draft of Strategic Economic Outline Case Present the draft Strategic Economic Outline Case to the Garden Community Opportunity Board		On track	G
	Appoint consultants to provide options and mechanisms for delivery, leading to the creation of a delivery plan for consideration by the Board (e.g. JV or development corporations, Community Land trust etc.)	HE Funding	£10,400.00	-	Appoint Consultant	13/01/2020	Draft procurement documents (brief etc.) Undertake procurement process (Internal process/HE process)		At risk: If HE Capacity Funding Bid is unsuccessful, commissioning this report is at risk and the pace of the project will be impacted	O
	Establish current land values (no scheme principle) and engage with Homes England on the use of a development appraisal tool.	-	-	-	Establish current land values	TBC	Discuss with Homes England the use of their development appraisal tools/external resources. Use appropriate development appraisal tools to establish viability levels. Prepare summary of the current land values		Completed	G
	Appoint consultant to provide a high level viability report	HE Funding - Competitive Bid: Fees to be accrued 2020/2022	-	£10,000.00	Appoint Consultant	01/07/2021	Draft procurement documents (brief etc.) Undertake procurement process (Internal process/HE process)		On track	G
	Draft the high level viability report	See above	-	-	Publish the High Level Viability Report	TBC (Third SHGCOB meeting)	Instruct the consultant to produce the High Level Viability Report Sign off draft of High Level Viability Report Present the draft High Level Viability Report to the Garden Community Opportunity Board		On track	G
Establish the Stakeholder Forum and Land Owners Forum	-	-	-	Set up the Stakeholder Forum and Land Owners Forum	TBC (First SF Meeting)	Instruct consultant to set up the Stakeholder Forum Appoint external membership to each of the forums Arrange individual inception meetings with each key partner to confirm main contact, roles, responsibilities, project management tools/timetable, and establish the principle of a Memorandum of Understanding etc. First Forum Meetings	Completed On track: Potential for delays due to CV19 On track: Potential for delays due to CV19 At risk: SF/LF delayed due to CV19. Postponed until October 2020	G O O O		

CLEAR IDENTITY AND STRONG LOCAL VISION AND ENGAGEMENT	Undertake a Communities Survey establishing residents views on what makes a good community	Included within Community Engagement funding stream	-	-	Publish the Communities Survey (Results)	TBC (Second SHGCOB meeting)	Instruct consultants to produce the Communities Survey Scope out the key questions of the Communities Survey (internal) Launch and run the COVID-19 Survey (with continuous monitoring and targeting of specific groups if required) Summarise the finding of the Survey Present COVID-19 Survey results to the Stakeholder Forum Scope out the key questions of the Communities Survey Launch and run the Communities Survey (with continuous monitoring and targeting of specific groups if required) Summarise the finding of the Survey Present Communities Survey results to the Stakeholder Forum Present Communities Survey results to the Garden Community Opportunity Board	HDC GC Team	Completed Completed Completed Completed At risk: SF/LF delayed due to CV19. Postponed until October 2020 At risk: SF/LF delayed due to CV19. Postponed until October 2021 On track: Digital only (due to CV19) On track On track: Potential for delays due to CV19 On track: Potential for delays due to CV19	G G G G O O G G G G
	Establish an effective engagement strategy with communities	Included within Community Engagement funding stream	-	-	Publish Engagement Strategy (live document)	TBC (Second SHGCOB meeting)	Instruct consultants to produce the draft Engagement Strategy Scope out the key aims and objectives of the Engagement Strategy with the Stakeholder Forum as well as potential participants for the workshop (see below) Arrange workshop with a wide range of the community/community groups (especially young people who tend to be underrepresented) to establish: - Who should be consulted - What are the most effective methods of consultation and when should consultation happen Review first draft of the Engagement Strategy Present the Engagement Strategy by the Stakeholder Forum Present the Engagement Strategy by the Garden Community Opportunity Board	HDC GC Team	Completed At risk: SF delayed due to CV19. Postponed until October 2021 At risk: Potential for delays due to CV19 At risk: To limit delay, the strategy can be drafted and then the strategy tested at SF/public consultation On track: Potential for delays due to CV19 On track: Potential for delays due to CV19	G O O G G
	Create an online space where information on the potential Garden Community can be held, for residents and stakeholders	HE Funding - Competitive Bid: Fees to be accrued 2020/2021	-	£50,000.00	Launch the Garden Community website (Basic website)	30/04/2021	Instruct consultants to produce the Website Strategy Review Website Strategy Draft procurement documents (briefs etc.) regarding website engineers Undertake procurement process (Internal process/HE process) Set up the Garden Community Website - Phased approach	HDC GC Team	Completed Completed At risk: If HE Capacity Funding Bid is unsuccessful, commissioning the website is at risk and the pace of the project will be impacted At risk: If HE Capacity Funding Bid is unsuccessful, commissioning the website is at risk and the pace of the project will be impacted TBC: Phased development with landing page going live January 2021	G G O O G
DRT	In accordance with the agreed process (see Project Management and Resources), appoint consultants or instruct third parties to appoint consultants to undertake relevant baseline surveys (Transport and Modal Shift and Utilities). These studies will inform the place-making documents that will make up the Shapley Heath Prospectus.	-	-	-	Publish the baseline surveys	By November 2021	Draft procurement documents (briefs etc.) Undertake procurement process (Internal process/HE process/third party process) where required. Inception meeting with HDC Technical Lead Review first draft of the baseline surveys Present the findings of the baseline surveys to the Forums Present the findings of the baseline surveys to the Garden Community Opportunity Board	HDC GC Team/Promoters	Completed Completed On track: Potential for delays due to CV19 On track: Potential for delays due to CV19 On track: Potential for delays due to CV19 On track: Potential for delays due to CV19	G G G G G
	In accordance with the agreed process (see Project Management and Resources), appoint consultants to undertake strategy reports (Homes, Economy and Employment, Retail and Education). These studies will inform the place-making documents that will make up the Shapley Heath Prospectus.	HE Funding - Competitive Bid: Fees to be accrued 2020/2021	-	£55,000.00	Publish the strategy reports	By November 2021	Draft procurement documents (briefs etc.) Undertake procurement process (Internal process/HE process) where required. Inception meeting with HDC Technical Lead Review first draft of the strategy reports Present the findings of the strategy reports to the Forums Present the findings of the strategy reports to the Garden Community Opportunity Board	HDC GC Team	On track At risk: If HE Capacity Funding Bid is unsuccessful, commissioning these reports are at risk and the pace of the project will be impacted	G O
							Set up team to delivery Hart's Green Grid Strategy		Completed	G

SUSTAINABLE SCALE AND TRANSP	Consult with our communities on what is achievable through the green corridors - what could and should it include? - Workshops with representative bodies on the green corridors to look at the detail	Included within Community Engagement funding stream	-	-	Publish the draft Green Grid Strategy (Public consultation to follow)	TBC (Second/Third SHGCOB meeting)	<ul style="list-style-type: none"> Arrange workshop with a wide range of key stakeholders to establish: <ul style="list-style-type: none"> - Vision and Objectives - Establish the main users groups, their needs/requirements (including vulnerable users) - Identify main designations and options for potential routes - Identify options for future proofing - Identify opportunities to increase access to sports/recreation facilities - Identify opportunities to enhance well-being facilities - Establish the needs/requirements of key sensitive and opportunity ecology sites - Identify options for key green corridors routes - Identify landscaping/biodiversity opportunities - Identify building options: material, lighting, signage and other furniture - Identify branding options to provide continuity across the grid: urban and rural Summarise the finding of the workshop Launch and run the Green Grid Survey Summarise the finding of the Survey Present the finding of the Green Grid Survey and scope out the key aims and objectives of the Council's Green Grid with the Stakeholder Forum Draft the Green Grid Strategy Present the Green Grid Strategy to the Garden Community Opportunity Board 	Joint C.Ex/HDC GC Team	Completed Completed Completed Completed At risk: SF/LF delayed due to CV19. Postponed until October 2020 On track: Potential for delays due to CV19 On track: Potential for delays due to CV19	G G G G O O O	
	WELL DESIGNED PLACES & GREAT HOMES	In accordance with the agreed process (see Project Management and Resources), instruct third parties to appoint consultants to undertake baseline surveys (Landscape, Flooding, Drainage and Water Management, Heritage). These studies will inform the place-making documents that will make up the Shapley Heath Prospectus.	Promoter/Developer Funding	-	-	Publish the baseline surveys	By November 2021	<ul style="list-style-type: none"> Draft procurement documents (briefs etc.) Undertake procurement process (Internal process/HE process/third party process) where required. Inception meeting with HDC Technical Lead Review first draft of the baseline surveys Present the findings of the baseline surveys to the Forums Present the findings of the baseline surveys to the Garden Community Opportunity Board 	HDC GC Team/Promoters	Completed Completed On track: Potential for delays due to CV19 On track: Potential for delays due to CV19 On track: Potential for delays due to CV19 On track: Potential for delays due to CV19	G G G G G
		In accordance with the agreed process (see Project Management and Resources), appoint consultants to undertake strategy reports (Urban Design and Place Storied/Branding). These studies will inform the place-making documents that will make up the Shapley Heath Prospectus.	HE Funding - Competitive Bid: Fees to be accrued 2020/202	-	£20,000.00	Publish the strategy reports	By November 2021	<ul style="list-style-type: none"> Draft procurement documents (briefs etc.) Undertake procurement process (Internal process/HE process) where required. Inception meeting with HDC Technical Lead Review first draft of the strategy reports Present the findings of the strategy reports to the Forums Present the findings of the strategy reports to the Garden Community Opportunity Board 	HDC GC Team	On track At risk: If HE Capacity Funding Bid is unsuccessful, commissioning these reports are at risk and the pace of the project will be impacted	G O
		Phase One - Concept Masterplanning	Promoter/Developer Funding	-	-	Publish the Phase One Masterplan	By November 2021	<ul style="list-style-type: none"> Draft procurement documents (briefs etc.) Undertake procurement process (Internal process/HE process) where required. Review first draft of the masterplan Present the findings of the masterplan to the Forums Present the findings of the masterplan to the Garden Community Opportunity Board 	HDC GC Team/Promoters	On track On track: Potential for delays due to CV19 On track: Potential for delays due to CV19 On track: Potential for delays due to CV19 On track: Potential for delays due to CV19	G G G G
	LEGACY AND STEWARDSHIP	Visit other successful Garden Communities to investigate forms of stewardship and legacy being built in elsewhere	-	-	-	Undertake virtual site visits	01/04/2021	<ul style="list-style-type: none"> Arrange virtual site visits: Didcot, Culm, Tadpole and Poundbury Undertake virtual site visits 	Joint C.Ex/ HDC GC Team	On track: Potential for delays due to CV19 On track: Potential for delays due to CV19	G G
Working with the consultants, begin consideration of the respective methods of long term stewardship		-	-	-	Publish the critical analysis of stewardship options	TBC (Second/Third SHGCOB meeting)	<ul style="list-style-type: none"> Review and critically analysis methods of long term stewardship Present the report on the critical analysis of stewardship options to the Garden Community Opportunity Board 	HDC GC Team	On track On track: Potential for delays due to CV19	G G	
FUTURE PROOFED	In accordance with the agreed process (see Project Management and Resources), appoint consultants to undertake strategy reports (Climate Change Mitigation, Renewable Energy, Innovation/Future Proofing -Transport, Innovation/Future Proofing -Technology and Lifestyle). These studies will inform the place-making documents that will make up the Shapley Heath Prospectus.	HE Funding - Competitive Bid: Fees to be accrued 2020/2021	-	£40,000.00	Publish the strategy reports	By November 2021	<ul style="list-style-type: none"> Draft procurement documents (briefs etc.) Undertake procurement process (Internal process/HE process) where required. Inception meeting with HDC Technical Lead Workshop with LEP and other relevant key stakeholders Review first draft of the strategy reports Present the findings of the strategy reports to the Forums Present the findings of the strategy reports to the Garden Community Opportunity Board 	HDC GC Team/Promoters	On track At risk: If HE Capacity Funding Bid is unsuccessful, commissioning these reports are at risk and the pace of the project will be impacted	G O	
OPEN SPACES	In accordance with the agreed process (see Project Management and Resources), instruct third parties to appoint consultants to undertake baseline surveys (Agricultural Land Classification, Air Quality, Noise, Contamination, Trees, Ecology and Biodiversity). These studies will inform the place-making documents that will	Promoter/Developer Funding	-	-	Publish the baseline surveys	By November 2021	<ul style="list-style-type: none"> Draft procurement documents (briefs etc.) Undertake procurement process (Internal process/HE process/third party process) where required. Inception meeting with HDC Technical Lead Review first draft of the baseline surveys Present the findings of the baseline surveys to the Forums 	HDC GC Team/Promoters	Completed Completed On track: Potential for delays due to CV19 On track: Potential for delays due to CV19 On track: Potential for delays due to CV19	G G G G	

HEALTHY PLACES & GREEN	Review and agree the place-making documents that will make up the Shapley Heath Prospectus.						Present the findings of the baseline surveys to the Garden Community Opportunity Board		On track: Potential for delays due to CV19	G
	In accordance with the agreed process (see Project Management and Resources), appoint consultants to undertake strategy reports (Health Needs and Impact, Active Lifestyles, Green Infrastructure (including Community Facilities/Sports and Leisure/Play Space)). These studies will inform the place-making documents that will make up the Shapley Heath Prospectus.	HE Funding - Competitive Bid: Fees to be accrued 2020/202	-	£65,000.00	Publish the strategy reports	By November 2021	Draft procurement documents (briefs etc.) Undertake procurement process (Internal process/HE process) where required. Inception meeting with HDC Technical Lead Review first draft of the strategy reports Present the findings of the strategy reports to the Forums Present the findings of the strategy reports to the Garden Community Opportunity Board	HDC GC Team	On track	G
									At risk: If HE Capacity Funding Bid is unsuccessful, commissioning these reports are at risk and the pace of the project will be impacted	O
TOTAL SPEND (against 2019/20 Total GC Award of £150K)			£149,967.00	£406,147.50						