

**Worksheet Stage 1: Understanding your ambition and project status**

*The content of this worksheet is intended to provide prompts only. Please amend to suit your place, project or approach.*

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| **WORKSHEET Stage 1: Understanding your ambition and project status** |
| Key question  | *Notes and supplementary considerations* | **Notes**  | **Next steps**  |
| **Taking Stock** |
| **What is the council’s experience and knowledge of long-term stewardship?** | * What is the level of understanding within your immediate team on long-term stewardship.
* Make a note of who/what previous experience within your authority can be drawn on and invite them to speak to your team.
* Make use of online training resources such as TCPA guides.
* Identify who/which areas of the Council might need briefing or training on stewardship
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| **As a local authority, what is your role in the development?**  | Note: These are not mutually exclusive!* Plan-making authority (opportunity to set policy on stewardship)
* Development management (opportunity to ensure policies are enforced and principles inform application development)
* Partnership/Joint Venture (Opportunity to input to governance/operations)
* Direct delivery (see below)
* Master developer
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| **What are your mechanisms for influencing long-term stewardship on the site?** | * A corporate commitment to long-term stewardship
* Local Plan policy
* CIL Schedule
* Site specific planning documents such as a masterplan or SPD
* Through development management – granting of planning permission and associated developer contributions and conditions e.g. Section 106 contributions.
* Taking a direct role in delivery:
	+ As master developer
	+ As a housing company
	+ As part of a delivery consortium
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| **What role does the authority hope to play in terms of long-term stewardship?** | * To influence better outcomes on site through policy and/or development management
* To play a direct role in the governance and/or oversight of a stewardship organisation
* Direct role through adoption
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| **How will work on your stewardship strategy be resourced?** | Consider:* Who in the council will take responsibility for exploring stewardship options?
* If you are anticipating external input (e.g. legal or financial) how will this be paid for?
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| **Who are the key stakeholders who should be involved in developing and/or delivering a stewardship strategy?**  | These might include: * Local authority
* Parish Council
* Residents
* Special interest groups (e.g. Wildlife Trusts)
* Homes England

Those in your list might be included in your stewardship working group.  |  |  |
| **What stage is the development at in planning terms?**  | 1. Land is allocated in the local plan
2. The land is optioned
3. The land sale is still being agreed
4. The land sale has been agreed and the site is at pre-permission
5. The land sale has been agreed and the site has outline planning permission
6. Building has already started on site

While the circumstances will be specific to each place and project. As a broad guide - 1-3 provide the greatest opportunities to embed ambitious stewardship arrangements. Most sites may be at 4. For sites as 5-6 influencing or retrofitting stewardship arrangements may be limited to exploring opportunities for a stewardship body which co-ordinates existing management arrangements, or may not be possible at all.  |  |  |
| **Are there existing stewardship bodies or Management Companies within the development area?**  | * Who are they and what developments do they cover?
* What are the service charge arrangements?
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| **Has the landowner/promoter****/developer already proposed a stewardship approach for the site? If so, what does it propose?****[If you are unsure, go to Stage 4]**  | This may be a statement of intent or something more detailed. Other key questions:* Is it robust? (This is about due diligence i.e., does it set out what is expected, key roles and responsibilities and how finance and management will work?)
* What is the proposed financial approach? Are there to be service charges, and if so, what are the household estimates and are they capped?
* What are the potential risks with their proposed approach, and who is responsible for mitigating them?
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| **How might stewardship intentions/commitments be shared through public participation processes for the project?**  | * What public statements have already been made about stewardship on the site?
* When are key engagement moments happening with the project and how progressed might your strategy be by then?
* What key/high-level commitments can you make?
* Do you see a community development role for any proposed stewardship body?
* Which local groups might it be useful to build up an early relationship with?
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