

# Community-led Housing Toolkit 2

How to tackle project planning

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## Introduction: What and who is this guide for

This is a guide for groups who have decided to develop a community-led housing project and are looking for practical advice on how to plan it. It can be used by newly established groups, or by existing community groups interested in branching out into the delivery of a community-led housing project.

### How should you use it?

Use it to help you with planning the detail of your project, but because all projects are different, the advice contained in this guide won't be definitive. There will be times when you will need to seek further advice or make a judgment about something.

If you download and print this guide, write answers to the points raised in the text boxes shown. This will help you record your progress. Links to further sources of support are listed at Appendix A.

Though all elements of this toolkit could be handled concurrently, we suggest that for ease of use you try to complete each process in this guide before you move onto the next. However, you may find it necessary to bring in some elements of Toolkit 3 around Funding and Finance depending on how your project develops.

# Step One: Identify land or buildings

## Bring your project to life

If you haven't yet identified the land or buildings involved in your project, now is the time to really get the process moving. Securing land or buildings will underpin your business planning and bring your project to life.

### Is the site or building for your project in your ownership or control?

If it is, you can proceed to Step Two in this guide. However if it is not owned or leased by you, your group should consider carefully the amount of time and resources you wish to put into planning for a particular project before this is achieved, or at least assured to your satisfaction. Securing land or buildings can be a lengthy and complicated process - often with no guarantee of success. This is particularly the case if you are involved in a local authority asset transfer, compulsory purchase order or lease, though open market purchase or partnership purchasing can also be complex and time consuming. An option agreement may be an attractive alternative route.

#### Option Agreement

An 'option agreement' gives your community group the future opportunity to buy a piece of land or property. It's an agreement with the land owner that will also fix the future purchase price and is generally time limited. You will probably need to put down a deposit and if you don't go through with the deal in the allotted time, this deposit is normally lost. The important thing is that the option agreement can buy your group some time to develop plans and raise the funds to deliver your project. Then when everything is in place, you can take up the option to buy the land.

To compound matters, many local authorities will only consider entering into an agreement over land or buildings if your group has developed a robust business plan. However the project proposal you developed as part of Toolkit 1 may suffice to get the ball rolling and bring about an indication of their views.

When searching for a suitable site or building, remember to take account of key factors shown in this table.

Location and infrastructure	Statutory consents	Financial	Financial
Proximity to housing, town centres, places of employment and community facilities	Existing lawful uses	Cost	Site area and usable floor space
Public transport links	Valid consents for other uses or developments	Local rates and taxes	Condition and repair costs
Vehicular access	Planning policy context	Availability	Existing services and running costs
Infrastructure: roads, schools, facilities, drainage etc.	Special designations, such as greenbelt or Conservation Area	Terms/tenure	Disabled access
	Highways considerations	Borrowing implications	State and type of site including any conditions or constraints

### Have you considered an asset transfer?

Another possibility is some sort of asset transfer. Community Asset Transfer involves the transfer of ownership and/or management of land or buildings from a statutory body (such as a local council) to a community based organisation or group (such as a charity or CIC) at less than market value for local social, economic or environmental benefit.

<http://mycommunity.org.uk/programme/community-asset-transfer/>

A number of public bodies, in particular local authorities, have the power to dispose of land and buildings at less than market value where they are able to show that doing so will result in local improvements to social, economic or environmental wellbeing. The legislation that allows local authorities to do this is the General Disposal Consent (England) 2003.

There are also examples of local authorities disposing of land or housing on an ad hoc basis based on their desire to generate more housing. Both Liverpool and Middlesbrough local authorities have transferred vacant properties at virtually no cost, to local organisations wanting to provide housing, and there are also examples of land being transferred at no cost or below market value.

If you are interested in an asset transfer of land or buildings, you may find it useful to see the support and resources around asset transfer at

<http://mycommunity.org.uk/programme/community-asset-transfer/>

Write your notes here

### **Do you have professional legal support?**

We strongly advise that you do not proceed with an asset transfer, lease or purchase of a property without professional legal advice. However, there is general guidance available to organisations considering asset transfers and leases available from Locality and other community-led housing support organisations also have resources to offer; see appendix A. Make sure all members of your group's board are aware of the contracts you are entering into before you agree to proceed.

Write your notes here

### **Are you aware of the Community Right to Bid?**

If your organisation knows of a local building currently or recently in use as a community facility, you could apply to have it listed on your local Register of Community Assets. This is a mechanism which allows community groups or Parish Councils to ‘tag’ buildings so that if they come up for sale, the sales process can be halted for a period of six months (a moratorium). This prevents the owner selling the property without giving community groups a six month window in which to bid to purchase the property. There is more information on the website [mycommunity.org.uk](http://mycommunity.org.uk)

Write your notes here

## Step Two: Feasibility work

### Is the project basically viable?

Carrying out some solid investigative work at this point could help to reassure your group, partners and funders that your ideas are viable and achievable.

#### What does a feasibility study involve?

A feasibility study is about taking a rational and level headed view of whether your ideas actually stack up in financial terms; whether it is likely to achieve planning permission and so on. Someone needs to sit down and work through the various possibilities posed by the project to identify which one is the most likely to succeed when all critical factors are taken into account. It is at this point that a formal site appraisal will also need to be carried out.

In order to reach a decision about feasibility your group may be involved in certain costs, for example, the preparation of designs and land appraisal services. You may be able to carry out the bulk of feasibility work if your board has a good range of skills and enough available time, but you could also consider paying a professional to do it for you.

#### How will you select your scheme advisers?

If you need to bring in professional support at this point, remember it is vital that project advisers need to be managed. This is very much a job for the group's board of trustees. In terms of feasibility, groups often appoint an architect to work through the initial stages of a project, come up with early stage designs and generally assess the viability of the scheme. If it's a more straightforward project involving an existing building the services of a good surveyor may suffice. Before appointing a professional, you will need to design a project brief stating clearly the objectives of the project, what you want from the feasibility study, the timescale you have set and any conditions or restrictions on the project as a whole. (As an example, see Template 2. Preparing a design brief.) Also see <http://mycommunity.org.uk/resources/commissioning-consultants/>

You should carry out the selection process transparently, asking for quotations from at least three suppliers based on your agreed project brief. Then agree as a group who will be commissioned to carry out the work.

### Who does what?

- design team - designs the project
- project manager - runs the project
- contractors - build the project
- specialist consultants - help with/advise on the project.
- See Appendix B Which goes into greater detail regarding professional support

### Feasibility is based broadly on:

- Availability and cost of land or buildings forming the basis of the project
- Cost of construction or refurbishing homes and connected services/infrastructure
- Availability of funds/cost of any borrowing over time
- Ongoing running and management/staffing costs

### What's the benefit?

A feasibility study can prevent you going too far down the route of an unworkable option and could save your group a lot of time and money in the long run. It could alternatively provide reassurance to your group and to potential backers and funders that your project is basically sound and ready to proceed.

### How will you pay for it?

Occasionally funders open up small funding streams to pay for feasibility work, but more often than not, it is funded by CLH groups themselves through fundraising events and donations. Funding for community-led housing feasibility work where securing planning permission is involved, is currently available under the [Community Buildings Fund](#).

See [http://mycommunity.org.uk/programme/community-housing/?\\_a=funding](http://mycommunity.org.uk/programme/community-housing/?_a=funding) for more detail.

Write your notes here

## Step Three: Prepare your Business Plan

### Cover all the bases

A business plan is the document to which you will return time and time again, so getting it right is crucial. This will be the definitive guide to your project detailing every stage of development and it will become more detailed as the project progresses. Even if you can't complete all sections of it from the outset, you should at least include section headings in the structure so you know where you ultimately need to be.

#### What should a Business Plan include?

By this point in the project, compiling the Business Plan should be a matter of collating all the information you have already gathered together, identifying items that are missing and then presenting it all in one document. We advise that you use Template 1 at the end of this guide. If you have produced an early stage Project Proposal as advised in Toolkit 1, and a feasibility study as suggested at Step 2 of this toolkit, you will find the job of preparing a detailed Business Plan is eased considerably. Essentially, you need the following sections from the very outset:

- A set of clear aims and objectives
- A schedule of activity showing a critical path of events
- Project management detail - input, roles and responsibilities
- Detailed budget including cash flow projections
- Risk assessment
- Monitoring procedures
- Project briefs and specifications for suppliers

#### Critical path

A critical path identifies the tasks that must be achieved for the project to be successfully completed. Following the critical pathway should help you to stay focused and on track.

### **Risk assessment**

The usual structure of a risk assessment would be to identify potential risks, the likelihood of each risk occurring, the potential level of impact of each risk, and mitigation measures.

The template we have provided is based on a three-year outlook and builds on the previous project plan. It includes suggested section heads and pointers but it's important to note that different projects will require different sections. Often, the process of writing the plan informs the structure of it (i.e. as ideas develop, the order of the different sections may change and other sections and sub-sections may be created.)

### **Do you have all the information you need?**

As you start to populate the more detailed aspects of your Business Plan, it is likely that you will need to consider certain aspects as pieces of work in their own right. The best example of this is the funding and finance of the project. To access more help on this element, see Toolkit 3. Other examples are the planning process, the timescale of the project and the management of the project. (Appendix C: Planning permission basics.)

Make notes here about the elements of the Business Plan that you need to work on and assign members of the group to investigate them. If you do not have sufficient skill sets within your board, you may need to engage the service of other professionals to assist you with this process, for example, accountancy services around cash flow projections. To ensure continuity, ensure that this appointment process is conducted using formal briefs, and that selection is decided by the group as a whole.

Alternatively, you may wish to appoint a professional to assist you with the business planning process as a whole and that this person will co-ordinate the selection of advisers and suppliers on your behalf.

Write your notes here

### Who can help?

There are a wide range of organisations that support housing projects; See Appendix A for details. You may also find it useful to work closely with the local authority or other interested community groups. Sometimes local authorities have a Community Development Officer who may be able to assist. Many rural counties have Rural Housing Enablers to advise communities. They are generally employed by the relevant Rural Community Council (RCC) or the local council.

Alternatively, [Locality](#) opens membership to organisations involved in community-led housing projects and can provide advice and guidance on all community-led housing matters.

## Step Four: Keep everyone informed

### Why it's vital to keep the information flowing

Community-led housing projects are about providing decent housing to match the needs of your local community. It is important that they support the process and that they understand the progress of your project so that you can achieve a smooth transition from the initial idea, through planning permission to the final build.

#### What's the best way to communicate?

You need to match your communications to the profile of your audience. So if your community has a high proportion of older people who may not be familiar or comfortable with emailing or social media, remember to send out paper updates via newsletters for example. For the most part though, digital media provides the quickest and cheapest way to keeping people up to date. At the very least, you should consider setting up a website or a Facebook page and ensure it is current, informative and professional.

Hold open meetings every so often so that people can come along and catch up with progress, and ensure your consultation continues throughout the design process so that everyone has a chance to comment and contribute.

Information about progress also provides a great platform for you to call for volunteer support, so it pays to keep the conversation flowing.

#### Who should you keep in the know?

Apart from the local community, it's essential to keep partners up to date. So if your project involves an asset transfer, the local authority needs to be notified of the project progress. Any funders will want to see information on how the project has progressed, and particularly, how the local community has been kept in the loop. You must of course, keep any professional supporters up to date on your plans at all times.

Assign someone to be responsible for drawing up a Communications Plan and agree on a basic approach. Then ensure that communications are on the agenda at all progress meetings.  
See Appendix A: 4.

Write your notes here

## Appendix A. Prompter and Links

This document is a handy prompter to remind you of the key issues to be tackled when getting your community led housing project up and running. Useful links are also included for quick reference and further information.

### 1. Identify land and buildings

My Community

- <http://mycommunity.org.uk/land-buildings/>

UK Government

<https://www.gov.uk/find-government-property>

Land registry

- <https://www.gov.uk/search-property-information-land-registry>

### 2. Feasibility work

Rural Housing Alliance

- [http://www.midlandsrural.org.uk/media/77165/affordable-rural-housing\\_a-practical-guide-for-parish-councils.pdf](http://www.midlandsrural.org.uk/media/77165/affordable-rural-housing_a-practical-guide-for-parish-councils.pdf)

### 3. Prepare your Business Plan

- [https://www.princes-trust.org.uk/help-for-young-people/tools-resources/business-tools/business-plans?gclid=CMra4KOjuMkCFVQ\\_GwodRuAPhA](https://www.princes-trust.org.uk/help-for-young-people/tools-resources/business-tools/business-plans?gclid=CMra4KOjuMkCFVQ_GwodRuAPhA)
- <https://unltd.org.uk/2012/11/06/putting-together-a-business-plan/>

#### 4. Keep everyone informed

- [http://www.bigassist.org.uk/marketplace/library/article?path=/campaigns/communications/effective-communications-1/communications-strategy&utm\\_source=Big%20Assist\\_Strategyemail\\_17March2014&utm\\_medium=email&utm\\_campaign=Big%20Assist\\_Strategyemail\\_17March2014](http://www.bigassist.org.uk/marketplace/library/article?path=/campaigns/communications/effective-communications-1/communications-strategy&utm_source=Big%20Assist_Strategyemail_17March2014&utm_medium=email&utm_campaign=Big%20Assist_Strategyemail_17March2014)

#### links to other housing support organisation resources

- Locality
  - [www.locality.org.uk](http://www.locality.org.uk)
- CLT Network:
  - <http://www.communitylandtrusts.org.uk>
- UK Co-Housing
  - <http://cohousing.org.uk>
- Confederation of Co-operative Housing
  - <http://www.cch.coop>
- Self Help Housing
  - <http://self-help-housing.org>
- National Custom & Self Build Association
  - <http://www.nacsba.org.uk>
- Community Self Build Association
  - <http://www.communityselfbuildagency.org.uk/>

## Appendix B: Professional support

The following is an outline of the professional support a project may require with a brief description of the work they may handle

1. design team - designs the project
2. project manager - runs the project
3. contractors - build the project
4. specialist consultants – help with/advise on the project

### 1. Design team membership, depending on the project:

- architects
- landscape architects or landscape designers
- structural engineers
- services engineers

### 2. Project manager

- plans organisational structure and programme of work
- monitors progress of all aspects of the project
- acts as a single point of contact co-ordinating all parts of the project
- tracks the timetable
- controls and assign budgets
- checks documentation
- oversees standards and progress

### 3. Contractors

- the organisation that undertakes the construction process together with any sub-contractors taken on by them in liaison with the project manager

### 4. Specialist Consultants/Advisers

(may or may not be required depending on the project)

- site selection and assessment
- building selection and assessment
- finance and costs
- market assessment
- urban design and planning
- specialist surveyors
- accessibility
- archaeology
- specialist subcontractors
- environmental impact and management
- procurement route and contract choice
- brief writing
- facilities management

## Appendix C: Planning permission basics

### 1. Site/building ownership

You do not have to own land or buildings to make a planning application.

### 2. Criteria for assessing your application

Your planning application will be assessed against the Development Plan for the local area unless material considerations indicate otherwise. This covers a range of issues such as:

- the number, size, layout, siting and external appearance of buildings;
- the proposed means of access, landscaping and impact on the neighbourhood;
- sustainability, and whether the necessary infrastructure, such as roads and water supply, will be available; and
- the proposed use of the development

### 3. Outline and full planning permission

Permission can be obtained against all of these criteria at once using a 'full' planning application or in the case of new build schemes, you can apply for an 'outline' permission to see if the development is acceptable in principle.

The level of detail required for an outline permission is generally the proposed use, layout and size and scale of the development.

If outline permission is granted, the full details of the application need to be submitted before works can commence (within 3 years) - these are known as 'reserved matters'. The full details of the scheme (layout, number of houses etc.) must be in line with the outline permission. Full planning permissions last 3 years. NB The Government is currently considering a 'Permission in Principle' which may impact on the above.

#### **4. Fees**

Fees are payable for applications and are non-refundable. Contact your local planning authority for fees. There is a 50% reduction if the application is made by the Parish Council. You can find your local planning authority contact details here: [http://www.planningportal.gov.uk/wps/portal/genpub\\_LocalInformation](http://www.planningportal.gov.uk/wps/portal/genpub_LocalInformation)

#### **5. Timescales**

Developments of less than ten units (or less than 0.5 hectare) are termed as small and should be considered by the local planning authority in eight weeks. Larger applications should be decided upon in 13 weeks (unless an Environmental Impact Assessment is needed).

#### **6. Pre-Application Advice**

Early pre application advice from your local planning officers or highways department etc. is highly recommended though some local planning authorities charge for this service.

# Template 1. Business Plan

## Cover Page

- Name of Group
- Name of Project
- Date
- Contact details

## Contents

### Executive summary

#### Section 1: Introduction and background

- 1.1 Purpose of the Business Plan
- 1.2 Who we are
- 1.3 Mission Statement
- 1.4 Aims

#### Section 2: The project

- 2.1 Description of the project
- 2.2 Objectives
- 2.3 Outputs and impact
- 2.4 Policy context
- 2.5 Analysis of need and demand
- 2.6 Competitor analysis and marketplace review
- 2.7 Environmental scanning – PESTLE Analysis
- 2.8 SWOT Analysis

### **Section 3: Organisation**

- 3.1 Governance
- 3.2 Staffing and volunteers
- 3.3 Project management
- 3.4 Legal requirements
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- 3.6 Premises
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- 4.2 Capital budget breakdown
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### **Section 5: Timescale**

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- 5.2 Detailed cash flow breakdown

### **Section 6: Evaluation**

- 6.1 Capacity, performance and outcomes

### **Appendix 1 - Staffing structure**

### **Appendix 2 - Director biographies**

### **Appendix 3 - Risk analysis**

# Business Plan

## Executive summary

This consists of an overall summary of the entire document. It could be no longer than one page. It gives the reader a 'taste' of the document, briefly identifying the main aspects. It should be completed last of all (even though it appears first).

## Section 1: Introduction and background

### 1.1 Purpose of the Business Plan

### 1.2 Who we are

A description of the organisation, who it involves and its legal status.

### 1.3 Mission statement

This is a statement about the organisation and how you will achieve your vision for the local area.

### 1.4 Aims

What you will do to achieve your Mission. These will still be reasonably broad

- E.g.*
- *Work with other local organisations*
  - *Engage the community*
  - *Raise funds*

## Section 2: The project

### 2.1 Project summary

Use this section to describe the nature of your project and why you are pursuing it.

### 2.2 Objectives

State the objective of the project in clear terms. State what it is, where it will be located, who it is aimed at and the timescales involved.

Remember to be:

Specific: use precise wording

Measurable: can it be measured/counted?

Achievable: is this realistic?

Resourced: have you the resources to achieve this?

Time conscious: set a definite time limit on achieving your objective.

*E.g. Build an affordable 20 unit housing development to passiv haus standards to be funded via an HCA grant and built by our housing association partners by 2020.*

### **2.3 Outputs and impact**

Explain how many people will benefit from the project and in what ways. Identify the major social impacts that your organisation will support by completing your project. Link them back to your vision, mission and objectives.

### **2.4 Policy context**

The nature of the work of community led housing organisations often connects to a number of national, regional and local policies and strategies. Explain how your project fits into the local policy environment.

### **2.5. Analysis of need and demand**

What is the evidence that your project will meet an identified need in your community?  
What is the evidence that people want the housing you are proposing to build? Market research is needed here.

## 2.6 Competitor analysis and market review

Are there any other organisations that are providing something similar in the area? Who are they and what do they do? How does your proposal fit in with this? Could you put another community organisation out of business or limit your own success? Demonstrate that you have considered all the options and why your proposal is likely to succeed.

## 2.7 Environmental scanning – PESTLE analysis

A PESTLE analysis will help you to consider your project against the environment in which it will be operating. Consider all the points you can think of under the headings of Political, Economic, Social, Technological, Legal and Environmental.

Note them in the table and use the information when thinking about how your project will develop.

Political	Economic
Social	Technological
Legal	Environmental

Summarise the above analysis explaining how your project will operate in this environment and how you will tackle any challenges.

## 2.8 SWOT analysis

A SWOT analysis helps you to consider the best and worst elements of your project and helps you consider how to use or address each of them. Use the table below to do this and remember to draw on the outcomes of the PESTLE analysis, particularly to inform the opportunities and threats section:

Strengths	Weaknesses
Opportunities	Threats

Summarise the strengths and opportunities identified in the SWOT. Explain how you will build and capitalise on your strengths and take advantage of the opportunities available to you. Similarly explain how you will address any weakness or threats.

## Section 3: Organisation

### 3.1 Governance

Explain the structure of your organisation. How are Directors selected/elected? Does the organisation have a wider membership? Give information about the decision making processes, checks and balances, culture and knowledge. Include Director/Trustee biographies in the appendices.

### **3.2 Staffing and volunteers**

List the staff and volunteers who will be managing the organisation in the short and the long term. Explain the terms and conditions offered to the employees. Explain any training and development plans that will be implemented. Describe your volunteer management policy. In the Appendices it is useful to provide a diagram of the management structure.

### **3.3 Project management**

Who will oversee the capital development, ensure it is taken forward and protect the interests of the organisation? Who will handle project management once the capital element is complete?

### **3.4 Legal requirements**

Explain in detail how you have met legal obligations such as: Health and Safety, Buildings Insurance, Contents Insurance, Employers Liability Insurance, Public Liability etc.

### **3.5 Policies and procedures**

Explain the policies and procedures that you have developed (e.g. lettings policy, dealing with repairs, staff/volunteer security, children and young people, health and safety)

### **3.6 Premises**

Describe where the organisation itself is/will be based and any issues that are relevant to that premises going forward.

### **3.7 Marketing and communications**

Include a marketing strategy to show how you will market your development. Include a communications strategy to show you will keep the community, partners and funders updated.

## Section 4: Financial information

### 4.1 Summary of capital development work

Explain the various elements of project plan in relation to the capital (construction) phase. What needs to be done and by whom?

### 4.2 Capital budget breakdown

Prepare a detailed spreadsheet or expand your existing project budget to show all the costs and income related to the capital part of the programme.

### 4.3 Summary of revenue finance

Explain all the other elements (non-capital) elements of the plan, for example, the money you will spend on preparing designs and getting the project to planning permission stage.

### 4.4 Revenue budget breakdown

Prepare a detailed spreadsheet or expand your existing project budget to show all the costs related to the revenue elements of the programme. You should also prepare a separate budget showing how you will run your project after the construction phase is complete.

### 4.5 Pricing policies

Explain how you have arrived at the cost of your housing units/services (e.g. purchase or rental levels).

## Section 5: Timescale

### 5.1 Critical path

Prepare a detailed timetable for the project i.e. a plan that show all stages of the work involved in your project and the critical path that need to be followed.

You may find it helpful to do a separate capital delivery plan in more detail.

### 5.2 Detailed cash flow breakdown

## Section 6: Evaluation

### 6.1 Reviewing progress

Explain how you will review overall performance against this plan? You might consider a simple framework such as:

- a) Capacity: how have key functions performed? Consider governance, leadership, financial management, resource development, programme delivery, communication, and networking.
- b) Performance: Did you achieve your project targets?
- c) Outcomes: do you have a simple but robust way of explaining or demonstrating the benefits that have resulted from the project? Consider social value tool, case studies, evidence of changes in people, places, conditions or policies. (e.g. Social Return on Investment, Social Auditing/Accounts).

## Appendix 1 - Staffing structure

## Appendix 2 - Director biographies

## Appendix 3 - Risk analysis

The following table addresses the risks and weaknesses identified through the SWOT analysis (threats). It rates each risk item (as either high, medium or low), identifying the likelihood of that risk occurring and the impact it would have on the organisation if it did occur. It then provides an explanation of the strategy that the organisation will employ to either prevent that risk from occurring or limiting its impact if it does.

### Example

Risk Item and potential impacts	Occurrence	Impact	Strategy for addressing risk
<p>Weakened Management Committee through resignation and lack of involvement of Directors</p> <ul style="list-style-type: none"><li>• Trading illegally (i.e. committee doesn't meet)</li><li>• Loss of effective strategic decision making role</li><li>• Lack of support/accountability for staff and loss of staff members</li><li>• Lack of monitoring of activity</li></ul>	Low	High	<ul style="list-style-type: none"><li>• Regular meetings (bi-monthly) to present plans &amp; proposals for approval &amp; input</li><li>• Clear policies and procedures</li><li>• Fixed AGM dates</li><li>• Linking AGM to community events</li><li>• Timetable meetings for year</li><li>• Active recruitment of new members and thorough induction to clarify roles</li><li>• Co-option of expertise from partnership organisations onto board</li></ul>

## Template 2. Preparing a design brief

All construction projects are different and this guide does not provide an exhaustive list of all the potential requirements that should be communicated to a designer/architect/landscape architect. It is for guidance so should not be solely relied upon to cover everything - ideally professional input should also be sought. It does however set out the things to think about and discuss for any group involved in a project that involves the improvement or construction of buildings and land.

### 1. General information

This section should cover basic information about the project and the people promoting it and what they require from a designer/architect/landscape architect.

#### a) The project objectives

Set out the project objectives that have been agreed by stakeholders.

Set out a vision for the project - this is a statement about the kind of feeling that you want the building to have to those who visit it rather than a vision for what will go in inside the building or on the land - so words like light, space, warmth, beauty, efficient, may conjure up an aesthetic that you are looking for to guide a designer/architect.

#### b) The site

Where it is (Address), what it comprises (the land or buildings, any special features) - ideally with a map.

Site constraints.

#### c) Who the client is

The name of the organisation and the responsible individual. Also details of who will approve work undertaken as part of the brief.

Any other information available about the site or buildings (surveys etc.) can also be included.

#### **d) The users and activities**

- Describe the types of user of the space/buildings and the kinds of activities they will be involved in
- Describe the types of spaces and facilities that are required to meet users' needs

## **2. Detailed requirements**

This part should set out in detail all the facilities needed for the project or which have been thought of as desirable. The sections set out below provide a base for most requirements and others can be added to define the specific requirements of a project. It has two sections:

- General requirements that apply to the whole project
- Individual Space requirements which give specific requirements/ideas for each room/space proposed in the project. It is possible that some requirements can be defined in detail on a room by room/space by space basis using data sheets, if this is possible, describe the rooms in the general section below and add the room data sheet into the detailed requirements.

### **General**

Describe any need for the design, layout, and all general provision, to be finally agreed with the client and comply with requirements such as regulations and legislation in respect of escape, health, safety, and general welfare of the occupants/users.

### **Planning**

Describe the need for every part of the proposal to be designed in accordance with relevant land use planning standards applicable in the area and reference them where possible (e.g. Local Plan policies).

Insert here any requirements about the desirable relationship between spaces. For example:

- Circulation - should some spaces/rooms be connected to others directly?
- Common areas - are there special requirements for receptions/entrances/location of WCs?
- Should some rooms/spaces be completely self contained/accessed?

## Design objectives

- Set out here any design goals your project needs to achieve for example:
- Healthy by design principles to be uplifting and life enhancing,
- Affordable and low energy usage
- Relationship between landscaping and the building.

## Specific features

### Accessibility

This section can set out any requirements for accessibility over and above the general provisions of the Disability Discrimination Act and Building Regulations.

### Environmental and services design

This section should cover aspects of environmental performance and electrical and mechanical services. For example:

All aspects of the proposal should be designed to use energy and water as efficiently as possible and incorporate provision for rain water harvesting

All spaces and rooms should have access to daylight with appropriate shade provision where necessary. Include general details or space/room data sheets for the lighting requirements for individual rooms/spaces.

Account should be taken of the Display Screen regulations in office areas.

Good ventilation is required in all areas; particularly toilet/food preparation areas

Drinking water must be available to all users.

The acoustic design should take account of the variety of activities taking place and there must be adequate sound insulation between noisy and quiet spaces.

Requirements for electric sockets and IT cabling can be set out here

### **Safety and security**

This can set out any specific requirements for security and safety. For example - CCTV, shutters, fencing, use of surfacing, monitoring access and exit, gating, separation of parking and pedestrian areas

### **Finishes and fixtures**

Here requirements in relation to the following may be set out:

Wall finishes (easy to clean, fitted with display boards/strips?)

Floor coverings (non slip, carpet etc.)

Window dressings (curtains/blinds)

Colours/materials (ironmongery, doors and windows etc.)

### **Individual spaces**

Here requirements should be set out that relate to individual rooms or spaces and their specific features.

### **Timetable**

Set out any timing milestones that have to be achieved, key meeting dates where relevant etc.

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