

PROJECT INITIATION DOCUMENT

1.0 Purpose of the Document

- 1.1 This Project Initiation Document (PID) defines the Joint Local Plan Review project. It sets out the aims of the project, why it should proceed, who is involved and their responsibilities. This PID provides the basis for the management of the project and ultimately a base to assess its success.

2.0 Background

- 2.1 The Planning and Compulsory Purchase Act 2004 requires that local planning authorities produce a local development plan for their area. The National Planning Policy Framework (NPPF) states:

“The planning system should be genuinely plan-led. Succinct and up-to-date plans should provide a position vision for the future of each area; a framework for addressing housing needs and other economic, social and environmental priorities; and a platform for local people to shape their surroundings” (paragraph 15).

- 2.2 All Local Planning Authorities (LPAs) are required to review and, if necessary, update their local plan policies within five years of adoption, if not sooner.
- 2.3 Both Torrige and North Devon District Councils have Committee approval to proceed with a comprehensive Joint Local Plan Review with the aim of submission by December 2024.
- 2.4 We want this review to be carried out in a robust and objective way, putting in place an approach which is efficient and effective so that we have time to focus on developing a quality plan that all stakeholders can be proud of.
- 2.5 There are a range of reasons why it is now appropriate to commence a comprehensive review and update. The social, economic, environmental and political content within which the existing Plan now operates, is significantly different to that which was envisaged when the existing Plan was prepared.

Changes that have come about since the adoption of the Local Plan in 2018 include:

- Likely structural social and economic shifts due to Covid-19;
- Recognition of consequences associated to Brexit;
- The emergence of the Government's green agenda - the Environment Act 2021 and 25 Year Environment Plan;
- Continued relaxation of the planning system - including reform of the Use Classes Order and continued expansion of simplified routes to consent (i.e. prior approvals);
- Increased emphasis on housing delivery - including proposed changes to the standard housing methodology, future housing requirements and affordable housing thresholds; and
- Government's commitment to significant reforms to the planning system including the process of development management and the content and preparation of local plans.

More locally there are a range of issues that require consideration within a review including (but not restricted to):

- Declarations of Climate and Biodiversity emergencies;
- Changing patterns for use of town centres and retail habits;
- Evolving thinking on rural sustainability;
- Increasing emphasis on environmental considerations and carbon saving;
- The challenges of maintaining a housing land supply;
- Issues of coastal erosion and flooding;
- The delivery of affordable housing and wider housing affordability;
- Changing work patterns – including increases in home working;
- Significant structural reforms to the agricultural sector; and
- A changing context for the tourism sector.

3.0 Objectives

3.1 The objectives of this project are to deliver an up-to-date Joint Local Plan which:

- a. Is bold, ambitious and provides the framework for at least the next 15 years of growth.
- b. The plan should be all about what you want to see rather than what you don't.
- c. It will set the vision and strategy for how the area should be developed over the lifetime of the plan.
- d. It should be positively written to deliver the outcomes sought, recognising that in a complex environment with a variety of stakeholders and interests, development needs to be positively managed.
- e. Meets the districts' identified needs based on the proportionate evidence base.
- f. Delivers the associated infrastructure working with our partners
- g. Is evidenced based; and
- h. Is sound.

4.0 Scope

In scope

- 4.1 The Joint Local Plan relates to the whole of Northern Devon (excluding Exmoor National Park) and will cover the period up to 2040 and beyond.
- 4.2 Our Members have requested a 'comprehensive' review of the 'Plan'.
- 4.3 The review has used the Planning Advisory Service (PAS) Local Plan Route Mapper to inform the project plan and learn from best practice.
- 4.4 The plan will include strategic policies setting out an overall strategy for the pattern, scale and quality of development, with a view to securing a net zero carbon future, addressing climate resilience, promoting healthy places and lives principles, and the wider environmental objectives of the Councils.
- 4.5 Make sufficient provision for a number of key land uses: housing (including affordable housing), employment, retail, leisure, community facilities and other commercial development.
- 4.6 Provision of infrastructure (such as roads, electricity, sewerage, water, schools, health provision and open spaces that people need to live happy, healthy and safe lives).
- 4.7 Policies for the conservation and enhancement of the natural, built and historic environment including landscapes, green infrastructure and bio-diversity.
- 4.8 A comprehensive and up to date evidence base to support the local plan provisions.
- 4.9 Securing formal agreements and successful funding bids to ensure that development and site promoters provide the required infrastructure and community provision in a timely manner and to specifications to meet the Council's objectives.
- 4.10 A comprehensive engagement strategy with residents and stakeholders in line with an updated Statement of Community Involvement.

Out of scope

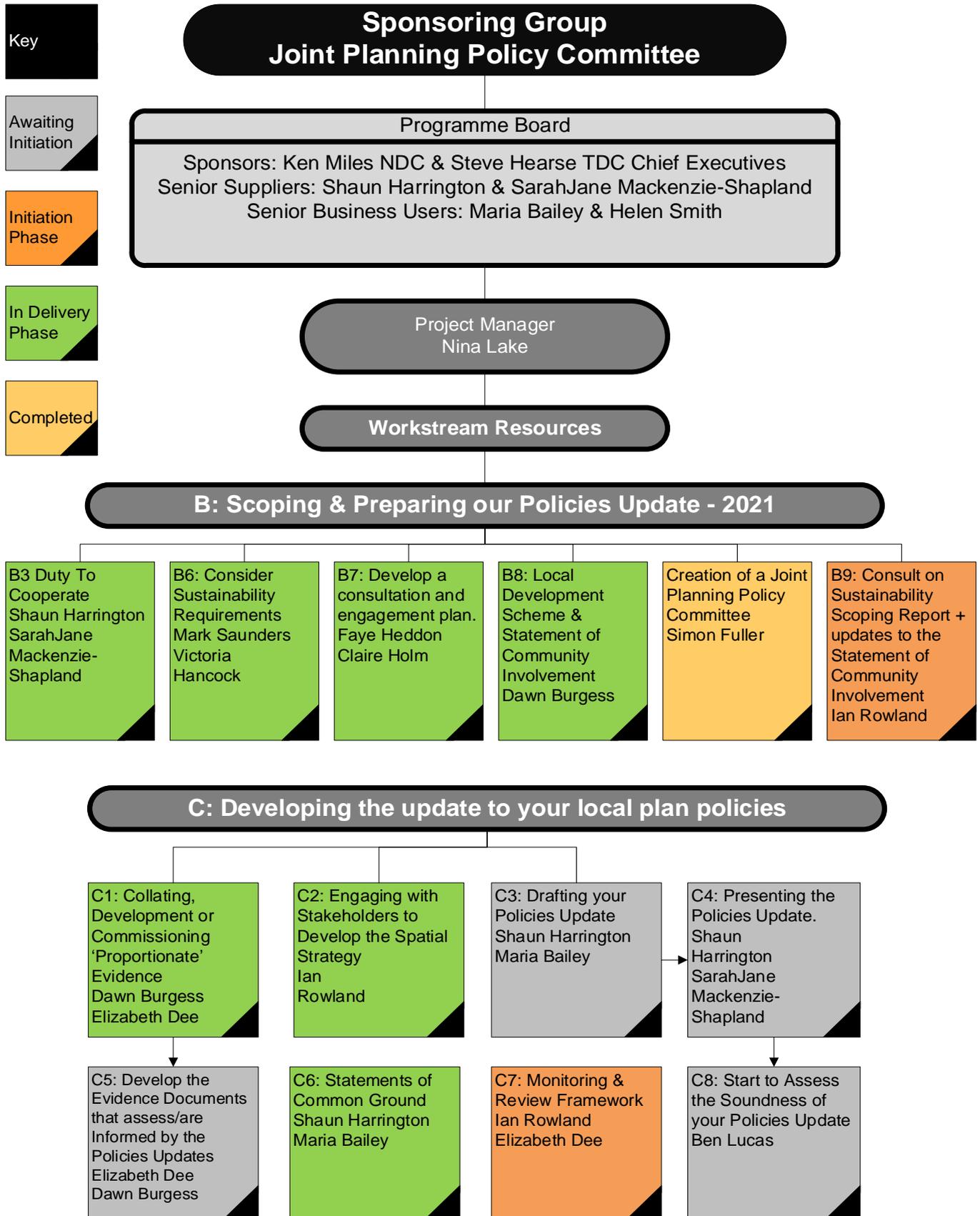
- 4.11 Exmoor National Park area.
- 4.12 Detailed explanation of how policies will be implemented. If further guidance is necessary, then this will be provided in supplementary planning documents.
- 4.13 Matters that extend beyond the legal scope of the planning system.



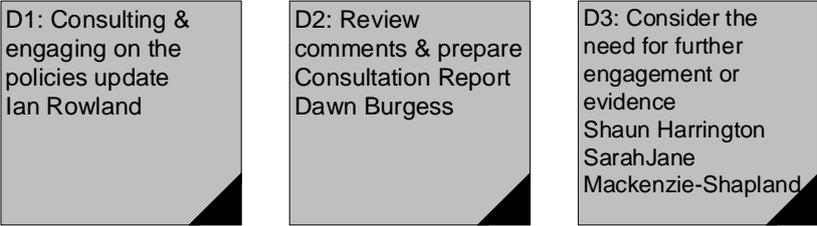
5.0 Success criteria

- Timely delivery of a robust Local Plan in accordance with the detailed Project Plan
- That all our members felt included in the development of the latest plan;
- Fosters ownership with communities and other stakeholders;
- Plan is deliverable, viable and achieves the vision;
- Is flexible and dynamic as possible to be future proofed and enable robustness despite future changes;
- Embraces and enables digitisation / ease of use of communities and other stakeholders;
- Successful at examination / adoptable;
- Addresses critical issues highlighted by Members, communities and other stakeholders;
- Plans for the delivery of sustainable development that meets the needs of Northern Devon;
- Provides sufficient housing & employment opportunities.

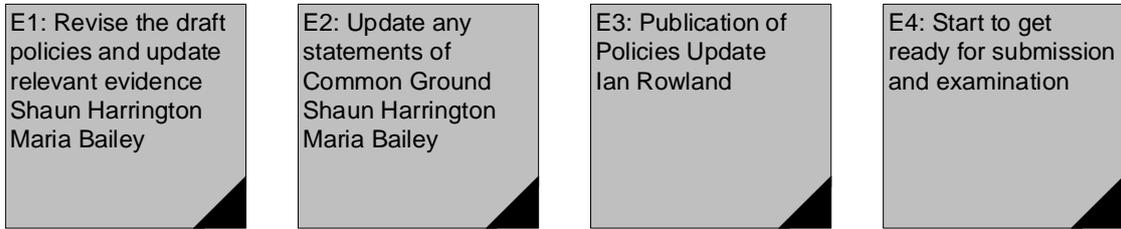
6.0 Project structure



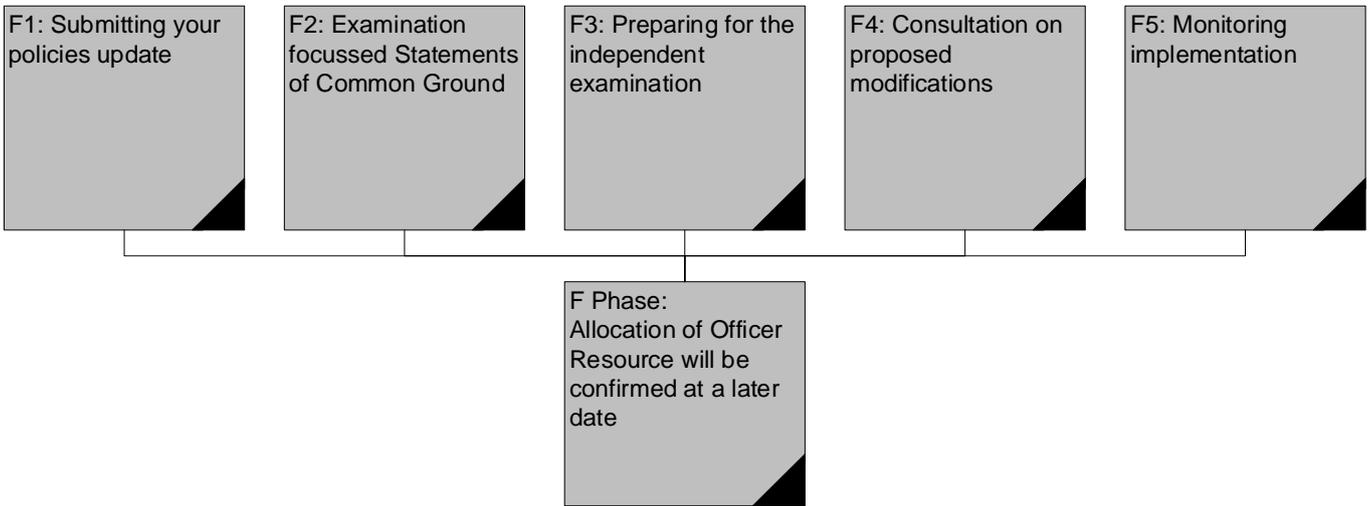
D: Consulting & engaging on the policies update



E: Developing the submission version of the policies update



F: Independent examination and adoption



Accountability and Responsibilities of the Board and Project Team:

Who	Roles & Responsibility
<p>The board is made up of the Sponsor, Business User & Senior Supplier.</p>	<p>The Board</p> <p>The Project Board is accountable for the success of the project and holds responsibility and authority for the project. Their role is to ensure the business benefits are delivered. They should be in a position of authority in the business to clear blockages and aid progress.</p>
<p>Steve Hearse Ken Miles</p>	<p>Project Sponsors</p> <p>A single individual (NDC and TDC each allocated the CEx) with ultimate responsibility for ensuring that the project meets its objectives and delivers the expected benefits. Ensures that the project maintains its business focus, has clear authority & the work (inc.risks) is actively managed. The Sponsor Chairs the Board (who are accountable). Represents the Business User and is responsible for the business case.</p>
<p>Shaun Harrington SarahJane Mackenzie-Shapland</p>	<p>Senior Suppliers</p> <p>The Project Board role that provides knowledge and experience of the main discipline(s) involved in the production of the project's product(s) to the specified quality. The Senior Supplier represents the supplier interests within the project and provides supplier resources.</p>
<p>Maria Bailey Helen Smith</p>	<p>Senior Business Users</p> <p>The Project Board role accountable for ensuring that the user needs are specified correctly and that the solution meets those needs. They represent those who will use the end product.</p>

Who	Roles & Responsibility
Nina Lake	<p>Project Manager</p> <p>The person given the authority and responsibility to manage the project on a day-to-day basis to deliver the required products within the constraints agreed with the Project Board and set out in the Project Initiation Document (PID). They report directly to the Sponsor.</p> <p>PROJECT INITIATION DOCUMENT</p> <p>B9: Gain approval of PID through the Joint Planning Policy Committee.</p> <p>B10: Finalise the PID.</p>
As above	<p>Project support</p> <p>An administration role in the project management team. Project support can be in the form of advice and help with project management tools, guidance, administrative services.</p>
<p>Work stream resources: The person responsible for the production of those products allocated by the Project Manager to an appropriate quality, timescale and at a cost acceptable to the Project Board. This role reports to, and takes direction from, the Project Manager. There will be several roles across the business that will be involved in the project.</p>	
Shaun Harrington SarahJane Mackenzie-Shapland	<p>DUTY TO COOPERATE</p> <p>B3: Duty to cooperate underway.</p> <p>C6: Statements of Common Ground</p> <p>E2: Update any Statements of Common Ground</p>
Mark Saunders Victoria Hancock	<p>SUSTAINABILITY ELEMENTS</p> <p>B6: Consider sustainability requirements Commission Land Use Consultants (LUC) to prepare Sustainability Appraisal Scoping Report (SASR).</p> <p>B9: Consult on the SASR through the Joint Planning Policy Committee.</p>

Who	Roles & Responsibility
	<p>B10: Finalise the SASR.</p> <p>Re-assess human resource for this strand. Incorporate the Sustainability Appraisal into the Policies update to support genuine 'options.' Re-commission LUC for assessments if deemed appropriate.</p>
<p>Dawn Burgess / Eilizabeth Dee</p>	<p>ENGAGEMENT & CONSULTATION STRATEGY</p> <p>B7: Development a consultation and engagement plan Draft Engagement Strategy – expanding on approach set out in</p> <p>B9: Consult on Statement of Community Involvement (SOCi)</p> <p>B9: Consult on Local Development Scheme (LDS).</p> <p>Branding Workshops with Team and Members. Consultation and engagement aligned to comprehensive review.</p> <p>D1: Consulting and engaging on the policies update.</p> <p>F4: Consultation on proposed modifications</p>
<p>Dawn Burgess</p>	<p>LOCAL DEVELOPMENT SCHEME / STATEMENT OF COMMUNITY INVOLVEMENT</p> <p>B8: Prepare Local Development Scheme (LDS)</p> <p>B8: Prepare Statement of Community Involvement</p> <p>B10: Finalise the LDS & SOCi</p>
<p>Simon Fuller</p>	<p>JOINT PLANNING POLICY COMMITTEE</p> <p>Creation of a Joint Planning Policy Committee</p>
<p>Dawn Burgess / Eilizabeth Dee</p>	<p>EVIDENCE BASE</p> <p>C1: Collating / developing 'proportionate' evidence</p>

Who	Roles & Responsibility
	<p>Evidence Type 1: Those that inform the preparation of Local Plan Policies; Evidence Type 2: Those that assess the impacts of local plan policies and any site allocations and are therefore needed to support the strategy, that the policies update is proposing.</p> <p>C5: Develop the evidence documents that assess / are informed by the policies update.</p>
Ian Rowland	<p>PREPARATION OF ENGAGEMENT APPROACHES</p> <p>C2: Engaging with stakeholders to develop the spatial strategy</p> <p>Continue high level options with senior leadership team and councilors on their vision and strategy. Extend engagement to other stakeholders, including departments within our own organization. Ensure all stakeholders captured in our Engagement Strategy.</p>
Shaun Harrington / Maria Bailey	<p>POLICIES UPDATE</p> <p>C3: Drafting Policies Update Clearly present in a way that decision-makers; applicants; infrastructure providers; local businesses and local residents can understand.</p> <p>C4: Presenting the policies update</p> <p>C8: Start to assess the soundness of your policies update</p> <p>D2: Review comments and prepare a Consultation Report</p> <ul style="list-style-type: none"> • Coding framework to analyse & report on consultation responses • Consultation report on issues • Update councilors and leadership team on next steps <p>D3: Consider the need for further engagement or evidence</p> <ul style="list-style-type: none"> • Commission / refresh evidence if required • Engage with key stakeholders • Update plan / policy wording and record in consultation statement <p>E1: Revise the draft policies update and update relevant evidence</p> <p>E3: Publication of the policies update</p>

Who	Roles & Responsibility
	F1: Submitting your policies update
Ian Rowland / Elizabeth Dee	MONITORING A6: Review 'Indicators' underway. Establish a good monitoring framework. C7: Monitoring and review framework F5: Monitoring implementation
TBC	EXAMINATION E4: Start to get ready for submission and examination F2: Examination focused Statements of Common Ground F3: Preparing for the independent examination

7.0 Project controls

Documents to be completed and managed by who:

- R.I.C&LL¹ Log managed by Nina Lake
- Project Plan managed by Nina Lake

Project reporting and frequency:

- Highlight report written by Nina Lake and presented to appropriate SMT / OMT by SarahJane Mackenzie-Shapland and Shaun Harrington and followed onto Joint Planning Policy Committee as scheduled.

Project team meetings:

- To be held at least Monthly arranged by Shaun Harrington

¹ Risk, Issue, Change and Lessons Learnt Log

8.0 Assumptions, dependencies and constraints

Assumptions

- Full community & political engagement throughout the lifecycle of the project;
- Stability of relevant legislation and national Policy during the lifecycle of the project;
- Maintenance of existing resources both financial & human; and
- Minimum housing numbers to be identified by the Local Housing Needs Assessment conducted using the Standard methodology (subject to recent government proposals) unless demonstrable evidence indicates otherwise.

Dependencies

This project is dependent on:

- Continued joint collaborative working using the 'One Team' approach;
- Cross boundary impacts;
- Continued political support.

Other initiatives / projects are dependent on this project:

- Climate Change / Carbon Reduction Plans;
- Housing Crisis and associated programme(s);
- Future Economic Development Strategy Review;
- Investment strategies & decisions.

Constraints

- Governments ambition for all Local Planning Authorities to have an up to date Local Plan by December 2023²;
- The Town & Country Planning (Local Planning) Regulations 2012 (as amended);
- National Planning Policy Framework (NPPF);
- National Planning Practice Guidance (NPPG);
- Sustainability appraisals will inform the process at key stages;
- Resources: time allocation and the availability of the project team members with the appropriate range of skills supplemented by specialist consultants and appropriate budget will be critical;
- Any restrictions as a result of Covid-19 and subsequent variants, may influence the methodology of community and stakeholder engagement;
- Proposed planning reform potentially resulting in unknown changes to process and product.

The 3 areas above will be reviewed and managed as risks or issues within the project.

² Evidence of sound planning and progress to date will mitigate

9.0 Quality /acceptance criteria

Product description	Quality	Acceptance Criteria	Accepted by who?
Set up a Joint Planning Policy Committee	Heads of Terms	Joint Member Working Group	October 2021 Both Full Councils
Statements of Common Ground	Use of PAS Template to ensure robust statement prepared		Senior Suppliers
New Local Development Scheme ³	Realistic timetable for publication for our stakeholders (including the Planning Inspectorate)	That the timetable has been tested and is deemed to be deliverable	Senior Suppliers endorse and approved by the Joint Planning Policy Committee
Statement of Community Involvement		Conformity with relevant legislation	Senior Suppliers endorse and approved by the Joint Planning Policy Committee
Sustainability Appraisal Scoping Report / Framework	Applying best practice and engaging external expertise	Conformity with relevant legislation	Senior Suppliers
Evidence Base	Ensuring all 'proportionate' evidence is identified and collated, showing a clear thread of how these 'hang together'.		Senior Suppliers with overview by the Joint Planning Policy Committee.
Engaging with Stakeholders using various approaches	Continual and appropriate engagement throughout the lifecycle of this project.	Conformity with the Statement of Community Involvement and relevant legislation.	Senior Suppliers
Policy Updates	Clearly presented in a way that decision makers, applicants, infrastructure providers, local business and local	Review by the Communication Teams to ensure legibility, and Senior Business Users to ensure workability.	Senior Suppliers endorse and approved by the Joint Planning Policy Committee.

³ A requirement under **Section 15 of the Planning & Compulsory Purchase Act 2004 (as amended)**

Product description	Quality	Acceptance Criteria	Accepted by who?
	residents can understand.		

10.0 Plan / timescale

Key Milestones	Completion date
Issues and preferred options consultation	November 2022
Draft Local Plan consultation	November 2023
Publication Local Plan consultation	June 2024
Submission to the Planning Inspectorate	November 2024
Examination Hearings	April 2025
Adoption	December 2025

11.0 Training

Training requirements will be reviewed and identified throughout the plan preparation period and relevant and appropriate training and Continuous Professional development provided as required, recognising the resource implications within the Project Plan and required expertise to meet a successful outcome.

12.0 Communication & Engagement

Plan preparation is subject to legislative requirements for community and stakeholder engagement. This is reflected in the Statement of Community Involvement (SCI) and in accordance with a live Communications / Engagement Strategy that has identified key stakeholders and will adopt engagement approaches to meet their needs, adding to this list as we move through the review process.

13.0 Recruitment

For a successful project, sufficient human resource will be required in terms of capacity, skills and experience. Continuous review of capacity will take place during the project lifecycle to ensure sufficient human resource. This will include the potential utilisation of consultants when specialist tasks or skills are required.

As well as the existing staffing structures of the Policy Teams of NDC & TDC, the following recruitment is agreed –

- Planning Policy Officer at North Devon Council – Advertised, but not yet filled;
- Full Time Planning Technical Officer at Torrige District Council – Position to be advertised;

- Retention of TDC temporary Graduate Policy Officer as a permanent position.

14.0 Implementation

There are no specific actions required to support the transition to the implementation phase of the programme. In place staff resources will shift their focus to the priority delivery of local plan work packages as part of their day-to-day work programmes. It will be necessary to optimise the wider activity of the planning policy teams and other contributors to ensure adequate resource may be appropriately directed toward the local plan work programme, whilst recognising that wider responsibilities and obligations will remain.

The timely fulfilment of vacant posts to ensure early additional capacity and resource should be prioritised. Prioritisation of early commissioning of consultancy support to deliver significant components of technical evidence, in accordance with project programme, will be necessary to facilitate the timely progression of the project.

15.0 Handover

Plan preparation process and wider project will conclude with plan adoption; achieved through resolution at a meeting of Full Council for North Devon Council and Torrige District Council. Consideration to be given to a joint Full Council meeting to ensure continuity of decision making and parallel adoption.

Necessary to embark on timely programme of communication, engagement, education and support with Plan users to support smooth migration to the new plan. Recognising immediate implementation of plan upon adoption, it will be necessary for this programme to be commenced as part of the handover prior to programme completion and plan adoption. Successful implementation will require a strong and comprehensive programme of activity, led by planning policy teams but with pro-active support from the Council's communication teams, members, senior business users, project sponsors and board.

Targeted technical training and engagement will be necessary for a range of users and groups including a number of internal customers - development management officers, Members, senior management team/ operational management team, and a range of external customers – planning agents, developers, town and parish councils, statutory consultees/ stakeholders. A wider programme of bespoke and targeted publicity, engagement and communication will be appropriate and necessary for wider Council membership and staff, communities and other stakeholders to ensure understanding and 'buy-in' to the plan, its ambitions and provisions.

16.0 Post implementation activity

A range of post-implementation activity will be necessary following the successful adoption of the local plan. As a continuation of the handover activity, an on-going programme of communication, engagement, education and support will be necessary – ensuring that the plan's ambitions, objectives and specific provisions are appropriately understood and applied.



As time progresses, this activity would be anticipated to migrate from a wider programme of broad notification and education to more focussed and detailed engagement with particular users or groups. The on-going need for marketing and publicity of the plan, utilising social media and other channels, will be in order to ensure continued buy-in with communities and other stakeholders.

As part of ensuring reflective practice, a review of the plan making process and the wider project will be undertaken, to ensure that lessons (both positive and negative) are learnt and adopted for future work. A programme of plan monitoring, review and reflection commence – tied to the Monitoring Framework and principally delivered through activities associated to the preparation and publication of annual Authority Monitoring Reports (AMRs); reviewing the performance of the plan to ensure intended outcomes and determine the need for further support, review or amendment.

Following a period of reflection, consideration will be given to the need for any supporting guidance; to be delivered through the preparation of formal Supplementary Planning Documents (SPDs) or otherwise through informal routes such as Frequently Asked Questions (FAQs) or practice notes. In accordance with legislation, the adopted plan will be subject to review within a period of five years from adoption to ascertain whether it remains up-to-date or whether an update will be necessary.