

**TRANSCRIPT OF BRIEFING BY ASHLEY TRULUCK AND SUBSEQUENT DISCUSSION ON
THE HANDOVER OF THE NEIGHBOURHOOD PLAN TO BROADCHALKE PARISH COUNCIL - 14 JULY 2021**

GESTATION OF THE BROAD CHALKE NEIGHBOURHOOD PLAN (BCNP or 'The Plan')

1. Last week's Referendum marked the culmination of 15 years development:

- **National - 15 years ago:** when I was Programme Director in *Department of Communities & Local Government* (DCLG) in London, I helped shape the original concept of delegated Community Programmes and Planning.
- **Wiltshire – the past 10 years:** I have championed the concept of Community Housing and Neighbourhood Planning (NP) in Wiltshire as Chairman of *Wiltshire Community Foundation*. This has included giving presentations on the drafting of Neighbourhood Plans and the critical transition from neighbourhood planning to Parish Council implementation (i.e. this briefing).
- **Broad Chalke - the past 6 years:** I have led a very talented group of local volunteers, including a qualified architect, a lawyer, local historian and farmer, and a representative cross-section of local people who have developed the NP 'bottom up' via a huge amount of research & analysis, fundraising, and consultation - and we have already (uniquely) implemented its more urgent recommendations. The group has included Edward Fry as the PC's representative throughout.
- **Benchmarking - last year:** as High Sheriff I was able to visit (in person and virtually) a number of other parishes undertaking Neighbourhood Planning – and learned a lot in terms of what works and what doesn't.

AIM

2. Rationale: Having thus been involved in the NP process at national, county, and local level since its inception, I have seen that there are two key causes of potential failure:

- **Preparation Phase.** The volunteer group frequently fail to complete the NP process due to the sheer amount of time, work, expertise and money involved. Happily, this was not the case with Broad Chalke.
- **Implementation Phase.** The NP's policies and action plan are often not carried through due to a loss of continuity/expertise when the expert volunteer group handover to the adopting Parish Council – with the result that the NP loses pace and credibility both at County and local level.

3. Aim: That is why I am so keen to ensure that all the work that has been put into planning so far is not wasted, and that the transition from planning to implementation goes smoothly inasmuch that:

- We achieve a thorough handover of the '*Knowledge Base*' that the NP team has built up over 6 years,
- This accumulated expertise and evidence remains accessible to the PC throughout the remaining 5 years of the NP (i.e. to 2026).
- The PC is clear as to what Wiltshire Council expects in terms its responsibilities for implementing the BCNP's *Policies* and *Action Plan*.

KNOWLEDGE BASE

4. The Broad Chalke Neighbourhood Plan document forms the framework for all future planning and implementation work carried out by the PC. *It is therefore vital that all PC members are thoroughly familiar with the details of the Policies (i.e. approved recommendations) and Action Plan contained in the Plan, and the rationale behind them. They will need a hard copy available for reference at all times, particularly at PC meetings¹.*

¹ Some PC members have already purchased their copy and I have left spare copies with the Parish Clerk for distribution to those who have not yet done so. They cost me £8.50 per copy to print – but I have been selling them at £4.90 to make them more accessible. I would appreciate a nominal payment of, say £4 a copy via the Parish Clerk to help cover my costs – but if you are not willing/able to pay that, I would prefer you take a copy for free rather than do without.

5. **The Supporting Documents.** The Plan is however no more than an Executive Summary of the vast amount of consultation, survey and documentation which led to its adoption by referendum. At some stage (e.g. if/when The Plan's policies are challenged either by Wilts Council or local developers, the PC will need to refer back to the range of supporting documentary evidence and/or their authors on the NP team (through me) to ensure they are not out-manoeuvred. This supporting documentation includes (but is not confined to):
- **Village Questionnaires** and the feedback & statistical analysis upon which Plan is based.
 - **Housing Needs Surveys** - which form the basis for the 6 x affordable and 3 x market homes being built.
 - **Consultation Document** – which records the above surveys and all other informal and formal consultation which has taken place over the past 6 years.
 - **Site Surveys** of all available potential building sites in the parish - by Wilts Council, NP team and an independent assessor.
 - **Strategic Environmental Analysis (SEA)** carried out by an independent consultant – and which sets the environmental framework for planning within the parish.
 - **Historical Survey** – a full survey (400 pages!) of all sites of historical or scientific interest within the parish.
 - **List of all buildings of historic architectural interest** within the parish which need to be protected.
6. **Supporting Expertise.** In addition, the following expertise/experience has been built up over the past 6 years by the NP Team and can be freely accessed via me at any time. *PLEASE do not attempt to deal with any specialist issues without first consulting me – as you otherwise risk duplicating the work we have already done or worse, may be outmanoeuvred by experts or developers with vested interests:*
- **Funding** – How to source funding/grants for community projects.
 - **Contact Details** and personal relationships with the key people in WC dealing with Community, Transport, Housing and Planning issues.
 - **Village Design Statement** – the town planning, architectural, environmental and legal expertise you will need to draw upon when interpreting Village Design Statement (i.e. Objective 3 of The Plan) – e.g. when considering planning applications.
 - **Local Development Aspirations** – who has applied or is likely to apply, to build within the Parish and the sensitivities involved (I will release this sensitive information only where relevant).

LESSONS LEARNED

The following advice is based on what I have learned in developing the BCNP or when visiting and mentoring other neighbourhoods who have planned and are now implementing their NPs:

7. **A Plan is merely an agenda for Action** – so whilst the NP team's work has now ended, the PC's work is only just beginning. The BCNP's *Action Plan* should now become a framework for setting the annual PC agenda and PC members will need to refer to it at almost every Council meeting – certainly when implementing its policies or when faced with planning applications.
8. **The Action Plan (Parts 6 & 7 of The Plan – pp. 99,100)** – is based mainly on feedback from villagers regarding local need and partly on statutory requirements set by Wiltshire Council as a pre-requisite for delegating actions to local level. Compared with other NPs, it's a relatively short Action Plan because I have already formed project teams and raised the money (c. £2M so far) to implement the more pressing and most expensive needs (Community Hub, Community Land Trust, Car Parking and Village Green, Causeway and linking paths). But that still leaves the Plan's 5 x Planning Policies to monitor and 6 x Action Projects to implement by 2026. So, you will need to form similar project teams and to source the funding required to complete the remaining Action Projects.
9. **Funding.** Remember that your PC funds cover only routine ongoing expenses, not Action Projects. You will have to source funding for the latter as part of the project management process. Inasmuch that all the Action

Projects have been endorsed in principle by Wilts Council, they will be a good starting point when seeking funding. However, like most Local Government Authorities (LGAs), Wilts Council will be operating with a budget deficit for the next few years due to Covid. On the other hand (as we found with BCNP projects to date) there is no shortage of money available from local donors or government/charitable grants for community projects – you just need to do your homework and flush it out. Remember that a clever way of leveraging LGA funding is to suggest they match-fund (pound for pound) whatever you raise from grants – and an equally clever way of leveraging grants money is to suggest the grant-making authority match-funds whatever you raise locally. (That is what we did with the Community Hub and Community Land Trust projects, and to an extent for the Causeway path projects). If this seems a tall order, remember that I have already raised £2M to implement the more expensive projects in the Plan almost single handed – it was time-consuming but not difficult. So, with a dozen or so Council members and no more than c. £100K to raise for the remaining Action Projects in BCNP, you have relatively little left to do. Remember also that you are merely acting as facilitators in this respect, you have the whole neighbourhood to call upon for help and expert advice.

- 10. It is a Neighbourhood Plan not a Parish Plan.** In accordance with national Neighbourhood Planning guidelines, BCNP was written *bottom-up* by villagers (which of course includes PC members), not *top-down* by the PC. PC have of course been consulted and involved at every stage and you have endorsed and adopted The Plan unanimously. The neighbourhood owns The Plan, you are implementing it on their behalf. So, expect the neighbourhood to hold you to account for implementing BCNP Policies and Action Plan– in the same way as we hope you will hold Wilts Council accountable if they fail to support the Plans’ policies.
- 11. How to play Wiltshire Council.** As LGAs go, Wilts Council (which I work with closely) are very good and generally very helpful. But like all LGAs they take the line of least resistance e.g. their Planning Departments will float various development concepts for consultation by way of ‘testing the water’ – and then go with whichever is best supported, or at least meets the least resistance. You (Broad Chalke PC) saw evidence of the former when you volunteered Broad Chalke as a pilot for the 20 mph scheme – an opportunity very well played. On the other hand, I have seen off many Wilts Council threats at the concept stage – for example the aspiration to build up to 43 homes on the New Town meadows was nipped in the bud before it ever reached a PC agenda. So what? – there is no doubt that you need someone on the PC actively monitoring the Wiltshire Council website, picking up these *opportunities* and *threats* at the initial concept/consultation stage. This is because once Wilts Council developed their thoughts into firm proposals – it is virtually impossible to change direction. And remember: many officials in county Planning Departments resent local ‘amateurs’ writing NPs (despite the fact that, in our case at least, we were able to amass a greater array of project management, town planning and legal expertise than they could!) – not least because funding for NPs came from cuts to Planning Departments. So expect them to test your resolve, expose your presumed ‘amateurishness’, and explore avenues to circumvent Our Plan going forward.
- 12. Your Wider Remit.** Our Neighbourhood Plan now forms an integral part of the Wiltshire Core Strategic Plan (see BCNP p. 10). *Ergo*, Broad Chalke PC is now much closer to Wiltshire Council than hitherto and needs to develop the same close ties with their Planning, Community and Highways Departments as the NP team have (see para 6 above). Having protected the PC from many of the threats and exploited many of the opportunities created by Wilts Council these past 6 years (para 11 above), I and the NP team are keen that you now take on this mantle. To give three examples of where we think you are currently exposed:
 - **Wilts Council Core Strategy.** You need to be in right at the start of the consultation process for the new Wiltshire Core Strategic Plan which is due to be implemented in 2026 (i.e. when our current Plan runs out and ceases to give us protection). The first consultation on the new Wilts Core Strategy (discussing housing targets and possible development sites) closed this month. Over 3000 people and organisations responded, including many from parishes of our size or larger. Broad Chalke PC did not respond and so missed an early opportunity to make its position clear before options crystallise – an opportunity lost.

These options will now be written up in the form of a second consultation round, so the PC will get a second opportunity to comment at this stage – hopefully before any real threat to Broad Chalke materialises. But I very strongly recommend that you must have someone on the PC monitoring the Wiltshire Council website for this sort of information going forward if Broad Chalke’s interests are to be protected.

- **South Wilts Community Action Transport Group (CATG).** This is a grouping of Parish representatives who get together periodically to bid for money delegated by Wilts Council for local community transport/traffic projects. Most Parish Councils in S.Wilts are represented and get their fair slice of the money available. When I first got involved with the BCNP I was surprised to find that Broad Chalke was not represented on the CATG and thus had never benefitted from this funding. I joined as the Broad Chalke rep and within months had our Causeway Path issue elevated to their top Safety issue – and within a year we had our Causeway Path built and road improved. Are Broad Chalke now represented on CATC and representing our other road safety issues highlighted in BCNP to it?
- **High Lane/Low Lane.** The threat of traffic to pedestrians on High Lane was cited as Broad Chalke’s highest road safety issue in the village questionnaire survey (other than the Causeway). The only safe way for residents of High Lane to walk into the village is via the original valley road – now a public path called Low Lane / Chapel Lane. The latter is impracticable in wet weather and so needs improving for all-weather use (whilst retaining its character as a country path). Although the Parish Council had previously dismissed such a project as inappropriate and unaffordable (strangely without discussion with the NP Team who were working on the issue), High Lane residents were reassured that the PC have since unanimously approved and adopted the BCNP which recognises their concerns– see p.87 (para 5.16 Road Safety, and 5.17 Pedestrian Safety) and have signed up to an Action Project to resolve the problem – see p.99 (‘Action Project 2: Promoting Pedestrian Safety’). The NP Team would be very happy to advise on funding and options based on their earlier work.

13. Our next Neighbourhood Plan. Our present Plan runs out in 2026, concurrent with the runout of the Wiltshire Core Plan. NPs take on average 5 years from concept to referendum, and follow-on NPs take up to 3 years – mainly because of the amount of consultation and documentary evidence required. Although done on behalf of the PC, the Plan needs to be drafted bottom-up by a volunteer steering group to meet NP Guidelines – as ours was. It is a very considerable task involving expertise the PC does not possess alone. If we are to continue to meet local needs and protect local interests post 2026, work on the replacement BCNP needs to start very soon.

THE ACTION PLAN

14. Reference: Please refer to the Action Plan and Plan Review Sections of BCNP (pp 99 and 100) for an executive summary of actions that need to form the framework of PC agendas going forward. I have added some (hopefully helpful) comments below:

15. Section 6 – Action Plan. (Note para 8 above – this is a combination of local neighbourhood needs and Wilts Council requirements)

- **Introduction (para 6.1).** Note that PC’s role is to facilitate implementation the following Action Projects by working with the community and key stakeholders:
- **Action Project 1: Public Rights of Way and Bridleways.** *Comment:* this is simply Wilts Council stressing the need to keep existing Rights of Way open - plus a helpful indication that it will support any suggestions for additional pedestrian pathways linking settlement areas (and thus avoiding extra vehicles or pedestrians on the increasingly busy valley through-roads).
- **Action Project 2: Promoting Pedestrian Safety.** *Comment:* This cites the improvement of Low Lane (see para 12 above) as Broad Chalke’s top priority safety issue and indicates that Wiltshire Council will support such a project. Initial work by the NP team indicate that this will involve some culverts / drainage work -

as did the Causeway Path - but that in this instance a gravel or raised path would be more appropriate than a tarmac one – so a comparable budget should be under £100K – a small sum by previous BCNP standards.

- **Action Project 3: Supporting the Community Hub.** *Comment: A sine qua non!*
- **Action Project 4: Local Flooding.** *Comment: This was a requirement inserted by Wilts Council in response to rising water levels due to Global Warming. I have noticed that the flood limits marked on the maps used by Wilts Council and reflected in BCNP as ‘official’ no longer reflect reality. Broad Chalke PC already has an Emergency Response Plan in draft – you simply need to add a section on Flood Prevention and there are plenty of other Parish Flood Plans available to use as a template.*
- **Action Project 5: Local Housing Need.** *Comment: The current BCNP Housing Needs Survey produced the requirement for 6 x affordable and 3 x market homes to meet local needs for the foreseeable future. It was always the intention to review this after these homes are built and we see what the take-up is. A second housing needs survey therefore needs to be conducted either as part of the drafting of the next BCNP or as an Action Project within it. Note, by the way, Wilts Council’s helpful condition regarding the market homes site i.e. that the landowner/developer must offer these homes for sale to local residents before release on the open market. This is an important part of ensuring that local development is limited to local needs.*
- **Action Project 6: Supporting the Broad Chalke Community Land Trust.** *Comment: Another sine qua non!*

Concluding Comment: The vast bulk of the implementation work (i.e. project management and fund-raising) potentially involved has already been done on the PC’s behalf by the NP team as it has gone along (e.g. for the Community Hub, Car Parking, Village Green, Causeway Path etc). This is unique inasmuch that the NP team’s job is normally drawing up a Plan, leaving the PC to implement it. In effect, the only real project left for the PC to project-manage is Action Project 2 and the NP team stand by to advise based on work done so far.

16. Section 7 – Plan Review. *Comment: This section is mainly Wilts Council’s statutory conditions for delegating planning to local level. Please note:*

- **Formal Review (Para 7.2):** The need for formal review of progress against the *Action Plan* and the need for the Plan’s approved *Policies* to be strictly adhered to (the Plan cannot be varied without further neighbourhood consultation and referendum).
- **Changes to National/Wiltshire Policy (para 7.2):** Watch this one – this Wiltshire Councils ‘let out clause’! It is a prime example where you must keep abreast of impending policy changes (they are invariably signalled in advance in the national press or on the Wiltshire council website) and defend your corner at the earliest opportunity.
- **Accountability (para 7.3):** The Annual Parish Council meeting is where the PC reports progress to the neighbourhood – and the neighbourhood have the opportunity to hold the PC to account (see para 10) – thus completing the democratic circle. It would be entirely appropriate to make this meeting a successor to the popular annual village consultation meetings which gave birth to the Neighbourhood Plan.

CONCLUSION

17. I hope you will find these ‘Handover Notes’ helpful as I pass the BCNP baton to you for implementation. Do not hesitate to contact me if any of the above is not clear. And I am of course available to advise and assist implementation as reasonably required going forward.



AEG TRULUCK
14 July 2021