**Site Assessment**

**Introduction**

Almost all Place Plan groups will be aware of, or could certainly find, small potential development sites within their area. That is because Local Development Plans do not usually hunt out or include very small, local sites. (If your LDP includes even very small sites, you may still know of or be able to find others.) Your Place Plan cannot formally allocate any site but you can provide the initial assessment that planning officers can use to help to decide whether development is appropriate.

This Toolkit is different to others available through the Place Plans website in that it is an example only. Each local authority will have their own set of questions and process for site assessment. It sets out a format based on what is now a well-proven methodology that local communities can use to undertake initial site assessment.

***It is essential that your Place Plan team contacts your Local Planning Authority for your area version of this toolkit.***

The Place Plan team will need to discuss and agree the process for your particular place. It will also be important to share and explain the approach with the wider community prior to undertaking the work.

The form probably goes further into detail than the assessments made by some local authorities for their more broad-brush decision-making about sites, but that detail would be needed to justify any formal allocation of a site by your authority. What is more, this type of assessment leads directly into helping to decide on the form, scale, style etc. of any development that then takes place; it maximises your influence over development detail as much as whether or not it happens.

A few key things to remember:

* All potential sites need to be considered using the same criteria to avoid the challenge that can come later in the process if a site is excluded.
* In addition, each site needs to be assessed clearly on its own merits; decisions about which to proceed with or leave out come later in a separate process led by your planners (though try to ensure that you are involved in this).
* Sites also do not have to be selected in full; it is possible to use the evidence of an assessment to show that only part of a site is appropriate.
* Finally, a site assessment can provide valuable guidance about the appropriate type, nature and form of development (or what might happen if the decision is to protect it).

**Using the assessment form**

*(This all assumes that you have identified some possible sites.)*

* Each site would ideally be assessed by a small group of 3/4 people.
* The best approach is for 1 member of your Steering Group to take 1 site each and to then find 2 or 3 other people to go and look at the site together.
* The others can usefully include someone who lives by/near a site but not more than 1.
* For each site assessment, there are four forms to be completed.
* Read through all the forms before going out on site, just to be sure that it all makes sense.
* For forms B and C it is possible to fill in some information before going out, adding to, checking and perhaps changing this once actually looking at a site.
* For each site you will need copies for all in the survey group of the forms on pages 1-8 and some maps\*.
* You will also need at least one clipboard and pens/pencils.
* All in the group can contribute but one final, agreed form is all that is needed for the records.
* Once assessments are complete, they should be kept in a folder.
* Ideally, also scan each set of completed forms.
* It is always good to take a few photos. Any photos, or a link to them, should also be kept.
* Not all boxes or topics in the form apply to all sites. Please use your judgement on those that are not relevant. If necessary just mark N/A for Not Applicable.

\* Your local authority will be able to provide detailed maps.

***REMEMBER: THE FORM THAT FOLLOWS IS AN EXAMPLE ONLY.***

***YOUR LOCAL AUTHORITY WILL NEED TO CHECK IT THROUGH WITH YOU.***

**Form A: Baseline information**

* *This is very basic - ‘given’ – information about a site, and provides a starting point for detailed assessment.*
* *For some sites the information will be available if the site was submitted to a local authority as part of a* ***Call For Sites*** *process.*
* *But you can query it or add notes (for example if you know of flooding not highlighted by the officers).*
* *For any sites you are looking at that do not have this baseline information available, your local authority may well be able to provide it (e.g. on any planning history).*
* *There are boxes below for basic information. The chart on designations that follows on page 4 asks for a simple yes/no in each case (ring a choice) plus any comments (e.g. on local flooding, as above).*

|  |  |
| --- | --- |
| **Local authority** |  |
| **Settlement name** |  |
| **Site name/address** |  |
| **Gross area (Hectares)** |  |
| **Site Reference Number** |  |
| **Capacity Assessment Information** (usually number of houses) |  |
| **Availability** |  |
| **Current/recent uses** |  |
| **Site Planning History?** |  |

***ALERT!*** *Below are some acronyms – please refer to the Planning Aid Wales website for a glossary of planning acronyms.*

|  |
| --- |
| **DESIGNATIONS & KNOWN CONSTRAINTS** |
| **In an Area of Outstanding Natural Beauty (AONB)?** YES NO  Comments: |
| **All or part of the site an SSSI or SNCI?** YES NO  Comments: |
| **In a Conservation Area?** YES NO  Comments: |
| **Any Listed Buildings on site?** YES NO  Comments (if not listed they may still be locally important): |

|  |
| --- |
| **Any Recorded Archaeology?** YES NO  Comments |
| **Public Rights of Way on site?** YES NO  Comments: |
| **Flood Risk on site?** YES NO  Comments: |
| **Any overhead wires on site?** YES NO  Comments: |
| **Any contamination on site?** YES NO  Comments: |
| **Other Known/Recorded Constraints?** |

**Form B: Assessing site connections**

**1. Walking to local facilities**

|  |  |  |  |
| --- | --- | --- | --- |
| *Facility* | *Distance (metres)* | *Route*  *Quality* | *Observations and comments on safety and quality of route*  *(Annotate the map if that helps. Photos can also help.)* |
| **Shop** |  | Good  Fair  Poor |  |
| **School** |  | Good  Fair  Poor |  |
| **Open Space** |  | Good  Fair  Poor | *(This is about publicly accessible spaces)* |
| **Bus Stop** |  | Good  Fair  Poor |  |
| **Any other facilities** |  | Good  Fair  Poor | *Other facility names:* |

**2. Vehicular and pedestrian access**

|  |  |
| --- | --- |
| **General quality of access** | **Tick one** |
| **Good**:  Easy access into the site and good roads approaching it. |  |
| **Fair**:  Poor access into the site but good approach roads. |  |
| **Poor**:  Poor access onto the site and poor roads approaching it. |  |
| *Number of Accesses. Type (vehicle or pedestrian)*  *Observations / Comments / Site Visit Notes / Record of Photos*  *Key Issues if Fair or Poor ticked* |  |

**3. Connections summary: overall, how well connected is the site?**

|  |
| --- |
| **Note key points in the site's favour in terms of connections:** |
| **Note any key points in terms of connections that would have to be addressed (mitigation) to make it a suitable site:** |

**Form C: Assessing the site environment**

* *For almost all these questions just ring a word (or two) in each box that best fits what you know/see and, as necessary, add some notes about quality, condition etc. in the space below.*
* *Photos are particularly important here. It can be good to mark on a map where any photos were taken from, with an arrow to show the direction in which the photo was taken.*

**1. Site characteristics**

|  |
| --- |
| **Landform:** *Flat Gently Undulating Strongly Undulating Steep Valley Valley Floor Plateau* |
| *Observations/Notes/Record of Photos:* |
| **Views In**: *Wide Channelled Long Short Glimpsed* |
| *Quality and Value of View/Record of Photos:* |
| **Views Out:** *Wide Channelled Long Short Glimpsed* |
| *Quality and Value of View/Record of Photos:* |
| **Natural Features on and round the site** (Age/Condition/Value):  *Boundary Hedgerow Trees Freestanding Shrubs Grass* |
| *Numbers, Quality and Value: Observations/Notes/Record of Photos* |
| **Ecology:** (Known/Observed):  *Birds Signs of Mammals Wildlife Corridors Water Habitat* |
| *Comment*s/*Notes, Quality and Value*: *Observations/Notes/Record of Photos* |
| **Built Form on and around the site:**  Walls On-site freestanding buildings/structures  Neighbouring buildings/structures in view Neighbouring use Potential Conflicts |
| *Comments/Notes: Observations/Notes/Record of Photos* |

**2. Environment summary**

|  |  |
| --- | --- |
| **Environment Quality and Value:** Does the recorded information above suggest that the site is of high environmental quality and value, or is it medium or low? | Tick one |
| **High** |  |
| **Medium** |  |
| **Low** |  |
| **Note key points in the site's favour in terms of environment:** | | |
| **Note the key points in terms of environment that would have to be addressed (mitigation) to make it a suitable site:** | | |

**Form D: Overall assessment summary**

* *Start by ticking one of the top three boxes, then add comments in other boxes.*

|  |  |
| --- | --- |
| **The site is suitable to be considered for allocation**  The site is well located and has lower environmental sensitivity to change. |  |
| **This is a potential allocation subject to on- or off-site mitigation**  The site is either well located but with higher environmental sensitivity to change or poorly located but with lower environmental sensitivity to change. |  |
| **The site is unsuitable for consideration for allocation**  The site is poorly connected and has higher environmental sensitivity to change. |  |
| **What are the key reasons behind your final judgement?** |  |
| **If the site was judged to be potentially suitable, what type of development might be possible or appropriate – housing, employment, facilities etc.?** |  |
| **If the site was judged to be potentially suitable, what mitigation might be needed to make it properly suitable?** |  |
| **If the site was judged to be suitable or potentially suitable, what principles or conditions might be applied (e.g. heights, screening, materials etc.)?**  (Add comments on the site plan if this helps, e.g. to show a key view.) |  |