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Department for Levelling Up,  
Housing & Communities

**Long-Term Plan for Towns Programme**

**Long-Term Plan Guidance**

**May 2024, Department for Levelling Up, Housing and Communities**

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## 1. Introduction

- 1.1. In September 2023, the Prime Minister launched the Government's launched the Long-Term Plan for Towns programme, a core part of our broader levelling up programme. We previously identified 55 'tranche one' towns across Great Britain that will receive funding as part of this programme and at the Spring Statement, the Chancellor confirmed an extension to the programme to an additional 20 towns across the whole of the UK, bringing the total investment to £1.5 billion.
- 1.2. This guidance provides further detail on the required content of a town's Long-Term Plans, building on our previously published [Long-Term Plan for Towns - Guidance to Local Authorities and Town Boards](#) from December 2023 (which details the programme objectives, investment themes and transparency requirements) and our [Technical Q&A document](#) published in March 2024.
- 1.3. This document applies to both 'tranches' of towns covered by the Long-Term Plan for Towns programme. For the 55 towns in 'tranche one', we expect Town Boards to submit their Long-Term Plans (comprising their 10-year vision and 3-year investment plan) by 1 August 2024. For the additional 20 towns announced at the Spring Statement, we expect their Long-Term Plans to be submitted by 1 November 2024.

## 2. Submission and Approval Process

- 2.1. Towns are encouraged to submit their Long-Term Plans as early as possible, as plans will be assessed upon submission.
- 2.2. Town Boards are responsible for developing the Long-Term Plan, working closely with the local community to co-design the plan. While the Town Board may delegate drafting and/or submission of elements of the Plan to the local authority, the Long-Term Plan must have been ratified by the Town Board.
- 2.3. The local authority's Chief Financial Officer will be required to submit a Statement of Grant Usage and an Assurance Letter to DLUHC alongside the Long-Term Plan. The Chief Finance Officer will be required to provide written confirmation that they have undertaken to actively apply all the necessary checks to ensure proper administration of the local authority's financial affairs regarding the funding programme, particularly in respect to financial administration and transparency of governance. This should also include compliance checks to ensure the governance requirements around the Town Board are being met.

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- 2.4. To ensure the local authority can execute its role, whilst supporting the Town Board to deliver the programme, the local authority should work closely with the Town Board to agree processes and procedures for management of the Fund. This should include developing and embedding an accountability structure that ensures the Town Board can make effective decisions around the allocation of funding to projects, whilst also allowing the local authority to maintain direct oversight of financial decisions as the accountable body.
- 2.5. The Plan may also be subject to other internal local authority approval processes prior to submission, given the Council's role as the accountable body in receipt of the grant via a Memorandum of Understanding<sup>1</sup>, and towns should build in time for this to occur where necessary.

### Principles of our approach

- 2.6. The town's Long-Term Plan will be subject to a light-touch assessment to provide assurance that:
- proposed activity aligns with the programme's investment themes (safety and security, high streets and regeneration, and transport and connectivity);
  - the Plan has been developed in consultation with the local community and residents, and is therefore reflective of their priorities; and
  - that appropriate processes and controls will be in place to deliver the programme effectively.
- 2.7. The Plan must be agreed between the Department for Levelling Up, Housing and Communities (DLUHC), the Town Board and local authority prior to funding being released.
- 2.8. A further stage of assessment will occur for towns where 'off menu' interventions are proposed, as detailed in **Section 8** of this guidance.

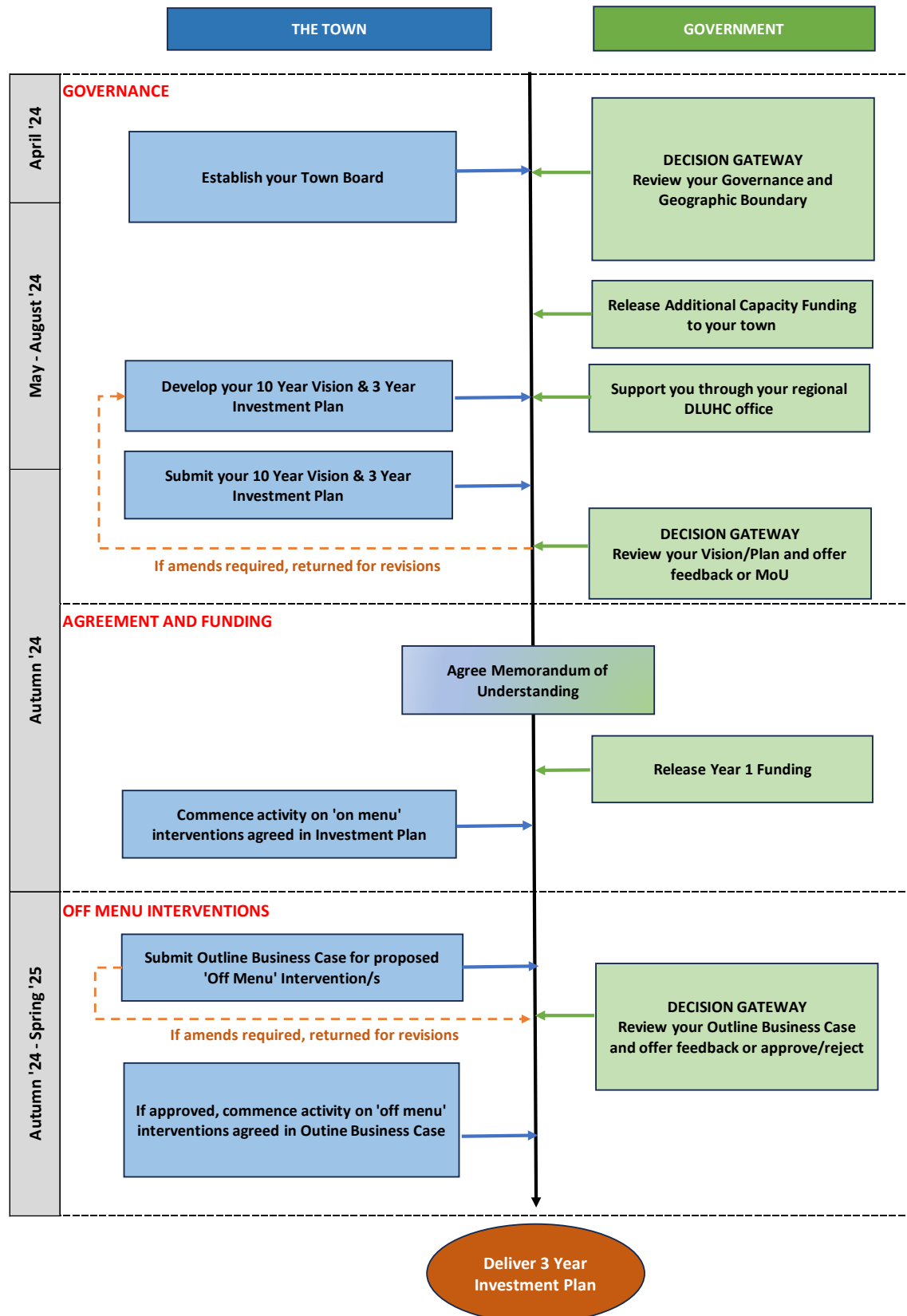
**The diagram below illustrates the key stages of the Long-Term Plan approval process.**

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<sup>1</sup> via Section 50 of the United Kingdom Internal Market Act 2020.

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## High-Level Summary: Long-Term Plan Submission & Approval Process



### 3. Preparing a Long-Term Plan – Key Considerations

#### Setting out your Vision

3.1. A town's Long-Term Plan for submission must consist of a:

- **10-year vision for the town**

The strategic vision for the town; where, why and how funds will be targeted over the 10-year period taking account the town's challenges and opportunities.

- **3-year investment plan**

A more detailed plan outlining the interventions the Board wishes to pursue within each investment priorities across the first three-year period of the programme, how funding will be indicatively allocated to specific intervention areas, when interventions will be delivered, the proposed route to market (where appropriate) and the management arrangements for the funding. This will set the baseline against which regular progress monitoring will occur.

#### Refining your Plan during Delivery

3.2. In the Long-Term Plan we expect to see a high-level articulation of the challenges towns wish to target, and the interventions they wish to prioritise to achieve this. As the programme progresses it is possible that towns will want to amend and refine their plans, to reflect further community engagement, alignment with match-funding sources and the practicalities of delivery. We will work with the lead local authority as part of the regular monitoring process and revert with an agreed change management process that sets out the mechanism to advise government of such iteration.

3.3. Given its strategic nature, we expect the 10-year vision to remain a broadly static document, refreshed only with the agreement of the Town Board and in response to further community engagement and/or local economic shocks.

3.4. The 3-year investment plan must set out the priorities for investment and how this links to the town's 10-year vision. Recognising the pace at which we are asking towns to move, it is not expected that this will be an exhaustive document detailing comprehensive plans for the projects that will be funded across the three years. This is discussed further in Section 5, below.

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## Funding

3.5. As confirmed previously, towns will receive up to £20 million of funding and support across the 10-year programme period.

3.6. For the 55 'tranche one' towns the full funding profile is as follows:

	23-24	24-25	25-26	26-27	27-28	28-29	29-30	30-31	31-32	32-33	33-34	Total
Total RDEL per place £(000)	50	449	423	449	449	449	449	454	467	467	467	<b>4,574</b>
Total CDEL per place £(000)		491	1,605	1,605	1,605	1,605	1,605	1,605	1,605	1,605	1,605	<b>14,936</b>
Total amount per place £(000)												<b>19,510</b>

3.7. For the 20 'tranche two' towns the full funding profile is as follows:

	24-25	25-26	26-27	27-28	28-29	29-30	30-31	31-32	32-33	33-34	Total
Total RDEL per place £(000)	250	672	449	449	449	449	454	467	467	467	<b>4,574</b>
Total CDEL per place £(000)		2,096	1,605	1,605	1,605	1,605	1,605	1,605	1,605	1,605	<b>14,936</b>
Total amount per place £(000)											<b>19,510</b>

## Funding Flexibilities

3.8. Within the initial 3-year investment period, towns will have the flexibility to rollover their programme and capacity funding across those three years. Within the initial 3-year investment period, towns will have the flexibility to rollover their programme and capacity funding across those three years. To note, this may be subject to review and change, the department will notify of any changes. Either by design in the 3-year plan, or if a Town Board underspends within year, that money can be rolled into years two or three with the certainty that the next tranche of funding will still follow.

3.9. The 'endowment-style' nature of this funding means each town will receive an annual, uniform, predetermined amount that is a broadly flat profile across each year of the 10-year span of the programme, similar to how Mayoral investment funds operate. This provides a predictable income for towns, delivering on the Prime Minister's commitment, responding to the feedback of stakeholders, and giving Town Boards the certainty to leverage private and philanthropic investment. Additionally, towns have the flexibility to rollover the funding we will be providing into future years.

3.10. At the end of the first 3-year investment period, for FY27/28 there will be a 'check-in' point, to analyse progress of expenditure for the programme and delivery across the first three years. Subject to review by DLUHC, it will be

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possible to rollover some unspent funding from the initial three year period into future years; however, towns are encouraged to maximise spend within each three-year period as much as possible. More details on the three-year checkpoint, and flexibility to forecast the rollover of funding into the Year 4-6 investment plan period, will be confirmed in due course.

### Interventions in Scope

- 3.11. All activity to be undertaken within the Long-Term Plan for Towns programme must align with the **Investment Themes** outlined in the December 2023 guidance.

**Investment Theme 1: Safety and Security**

**Investment Theme 2: High streets, heritage and regeneration**

**Investment Theme 3: Transport and connectivity**

- 3.12. There is no requirement as to how towns utilise funding across the three investment themes; however, we would expect to see at least one intervention per Investment Theme covered in the Long-Term Plan, unless towns explicitly justify an alternate approach.

### 'On' menu interventions

- 3.13. Proposed activity can be either 'on' or 'off menu'. Annex C of the guidance published in December set out a list of **interventions** that had already been assessed as having a strong case for investment, value for money and benefit-to-cost ratio. They are:

#### **Safety and security interventions**

- S1: Design and management of the built and landscaped environment to 'design out crime'.
- S2: Engage with Police Force and together consider interventions to focus on visible crime prevention in defined areas places.
- S3: Measures to prevent anti-social behaviour, crime and reduce reoffending.
- S4: Measures to reduce repeat burglary.

#### **High streets, heritage and regeneration interventions**

- H1: Funding for place-based regeneration and town centre and high street improvements.



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- H2: Funding for new or improvements to existing, community and neighbourhood infrastructure projects and assets including those that increase communities' resilience to natural hazards, such as flooding, and support for decarbonisation of facilities, energy efficiency audits, and installation of energy efficiency and renewable measures in community buildings.
- H3: Creation of, and improvement to, local green spaces, community gardens, watercourses and embankments.
- H4: Enhanced support for arts, cultural, heritage and creative activities, projects and facilities and historic institutions that make up the local cultural heritage offer.
- H5: Support for local arts, cultural, heritage and creative activities.
- H6: Funding for the development and promotion of wider campaigns which encourage people to visit and explore the local area.
- H7: Funding for impactful volunteering and social action projects.
- H8: Funding for local sports facilities, tournaments, teams and leagues.
- H9: Investment in capacity building, resilience (which could include climate change resilience) and infrastructure support for local civil society and community groups.
- H10: Investment and support for digital infrastructure for local community facilities.
- H11: Investment in open markets and improvements to town centre retail and service sector infrastructure, with wraparound support for small businesses.
- H12: Funding for the development and promotion (both trade and consumer) of the visitor economy, such as local attractions, trails, tours and tourism products more generally.
- H13: Grants to help places bid for and host international business events and conferences that support wider local growth sectors.

#### **Transport and connectivity interventions**

- T1: Support for active travel enhancements in the local area.
- T2: Funding for bus infrastructure and connections to speed up journeys.
- T3: England and Scotland Only: Additional revenue funding added to the Bus Service Improvement Programme Plus (BSIP+) funding model from June 2024.
- T4: Funding for new, or improvements to road networks to improve access within and to the town.
- T5: Funding to improve rail connectivity and access.
- T6: Reducing vehicle emissions.
- T7: Investment and support for digital infrastructure for local community facilities.

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- 3.14. Should a Town Board wish to pursue one of these interventions, a business case will not be required.
- 3.15. Towns should decide which **Investment Themes** and **Intervention Categories** to include in their Plan based on the output of their community engagement. While not an exhaustive list, the 'on' menu interventions have been intentionally designed to facilitate a broad range of activity and interpretation and we encourage towns to fully consider whether prospective activity fits within these interventions.
- 3.16. All proposed 'on' menu activity must be aligned to one intervention category, to simplify reporting. Where a proposed activity or project potentially spans more than one intervention category, it should be wholly allocated to the intervention that it best meets.
- 3.17. The Investment Themes and Intervention Categories selected can be iterated through the three-year investment period; as part of this initial submission, government is looking for an indication of intended spend. Further information on the requirements of the three-year investment plan is detailed below in **Section 5**.

#### **'Off Menu' Areas of Intervention**

- 3.18. The December guidance also included provision for towns to propose 'off menu' interventions (i.e. those outside the pre-agreed list of interventions), if they are considered to better fit local need and align with the investment themes of the Long-Term Plan for Towns programme. In such cases, a high-level description of the 'off menu' proposed intervention should be outlined in your three-year investment plan, for consideration as part of the main assessment process. Given the need for 'off menu' activity to be approved via an Outline Business Case process, towns may only profile spending on 'off-menu' interventions from the financial year 2025/26, to allow time for business cases to be developed and considered.
- 3.19. Where Town Boards would like to pursue 'off menu' interventions they should, in the first instance and at the earliest opportunity, engage with their respective Area Team contact who can advise as to whether the activity proposed fits within an 'on menu' intervention or is outside the scope of what is likely acceptable.
- 3.20. Further details about the 'off menu' approval process is included in **Section 8** of this guidance note.

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### Programme Indicators

- 3.21. Towns should identify the long-term outcomes and impacts that they are aiming to deliver in their Plan.
- 3.22. The department intends to collect data from towns in relation to a standardised set of programme outcomes and project outputs; further guidance will be published in relation to these indicators in due course, including information on how towns will be expected to report on the indicators and what will be included for the development of the 3-year investment plan.

### Geography and Spatial Targeting

- 3.23. Activity funded through the programme must be delivered within the agreed Long-Term Plan for Towns boundary. For participatory activity, it is not essential for all attendees/beneficiaries to be located within that boundary, provided the primary benefit of the activity is felt within the intended area. Similarly, interventions related to improving transport connectivity may extend beyond the agreed geographic boundary for the programme, e.g., funding for a cycle route from a location within the agreed town boundary to a location outside the boundary.
- 3.24. We strongly encourage towns to collect data related to the location of projects funded through this programme, as the department will be undertaking an analysis of how funding has been distributed in local areas as part of its wider approach to monitoring and evaluation.
- 3.25. We recognise that priorities will vary within towns, and Town Boards are absolutely justified in focusing their investment priorities into particular areas of the town, provided that spatial targeting is supported by robust data and evidence of need. The Long-Term Plan should clearly explain, both in the 10-year Vision and the 3-year Investment Plan, how spatial targeting will be utilised and the reasons for this approach.

### Community Engagement

- 3.26. Community engagement is at the heart of the Long-Term Plan for Towns programme. Long-Term Plans must reflect local priorities and be co-designed with communities, businesses, and residents, drawing on available evidence and data.
- 3.27. Plans must evidence extensive resident engagement and be clear about how the community's views have shaped and influenced the proposed interventions put forward – this will form a key element of the assessment.

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- 3.28. Plans containing insufficient evidence of community involvement in the design of the plan, or inadequate arrangements to involve the community in the delivery of the Plan, will not be approved and revisions may be requested, or conditions of approval set by the department.
- 3.29. Where the Town Board and wider community are not aligned as to the priorities for investment, this should be clearly set out in the Plan alongside proposals to reconcile these concerns in the delivery phase.
- 3.30. Engagement between the Town Board and local community must continue throughout the delivery of the Plan, to ensure residents remain informed of the Board's activity and progress. To this end, the Town Board, supported by their local authority, should publish their Long-Term Plan to ensure transparency. Further guidance will follow around the specific branding associated with the Long-Term Plan for Towns programme.

#### Alignment with Other Initiatives and Funds

- 3.31. The Long-Term Plan must complement existing or planned provision in the local area and be non-duplicative. We encourage Town Boards to consider how the interventions they are seeking to pursue through the Long-Term Plan for Towns programme complement other government funding in the locality. Similarly, Town Boards may use the funding to seek to access other government funding or to fund projects that have otherwise been paused. Decisions on the interventions a Town Board wishes to pursue are ultimately a decision for the Board, grounded in community engagement to reflect local priorities.

#### 4. Guidance for completion of the 10-Year Vision

- 4.1. The Town Board's 10-year vision must be a long-term, strategic document. It should be clear and concise, backed by insights gained through engagement with residents and how the Board will ensure the voice of local people is heard throughout the programmes 10-year lifespan.
- 4.2. There is **no set template** for the 10-year vision; however, the document must be structured into the sections outlined below, following the listed order.
- 4.3. Towns are encouraged to make use of diagrams, maps, and charts to support the narrative and may make use of relevant sub-headings where required. Additional annexes may also be submitted alongside the main document; however, annexes should be kept to a minimum and key messages from those annexes distilled and included in the 'primary' vision document, to aid assessment and form a single cohesive product for the community.

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- 4.4. Once agreed, a public-facing version of the 10-year vision document must be made available online. If it includes sensitive information, this may be removed prior to publication and towns should flag this to us upon submission, so that the information can be handled appropriately.

Section		Content Requirement
1	<b>Geography</b>	A map in PDF format, reflecting either the default ONS Built-Up Area geography or any revisions to that geography agreed with DLUHC Ministers.
2	<b>Vision Statement</b>	A 250-word (max.) vision statement that articulates the vision for the future of the town and how success will be judged.
3	<b>Strategic Case for Change</b>	<p>The strategic case for change in the town, building on the evidence in the data pack already provided by the department. This should be supported by additional, granular localised data and case studies.</p> <p>We will set out a page limit (TBC) for this, to avoid excessively long responses.</p>
4	<b>Outcomes and Objectives</b>	<p>The long-term change the Town Board would like to see in the town using the Long-Term Plan for Towns funding and how those objectives align with the priorities of the local community, including what local people think needs fixing, the opportunities the investment offers over the decade, and priority outcomes for 2034 and beyond.</p> <p>Further information on this will be included in the draft templates for submission, which will be shared in due course.</p>
5	<b>Areas of Intervention</b>	
i.	<b>Safety and Security</b>	Setting out the planned direction of travel across the three investment themes of the programme and, where known, an indication of the types of intervention that may be used to help achieve this vision.
ii.	<b>High Streets, Heritage and Regeneration</b>	
iii.	<b>Transport and Connectivity</b>	
6	<b>Alignment with wider investments</b>	Where appropriate, a short summary outlining how the 10-year vision for the Long-Term Plan for Towns programme aligns with and complements existing government programmes and investments.

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<b>7</b>	<b>Community and Stakeholder Engagement &amp; Participation</b>	Evidence of the Town Board's community engagement to date and ongoing commitment to being engaged with local stakeholders, including through its membership, ways of working and distinction from the local authority, and evidence of buy-in from local businesses, civil society, and communities.
<b>8</b>	<b>Other Investment Leveraged</b>	How the Town Board will attract and maximise opportunities for private, public, and philanthropic investment, setting out existing commitments and plans to secure further support going forwards.
<b>9</b>	<b>Governance</b>	<p>An outline of the roles and responsibilities within the Town Board.</p> <p>This should include:</p> <ul style="list-style-type: none"> <li>- governance structure for the programme, i.e., the relationship between the Town Board, accountable body, and any other parties;</li> <li>- a narrative indicating how the programme will be managed in line with the Nolan Principles and the principles of managing public money (regularity, propriety, feasibility, value for money whilst making sure that the objectives and outcomes of the programme are delivered);</li> <li>- a high-level overview of the route to market and process for appraising and approving investments.</li> </ul>
<b>10</b>	<b>Delivery Milestones</b>	High-level delivery milestones over the 10-year lifespan of the programme, with an overview of potential future interventions and how the powers in the policy toolkit will be used in a way that best suits the town across the three investment themes.
<b>11</b>	<b>Assurance</b>	High level indication of how the local authority will obtain assurance that the programme is delivered in line with Best Value and Managing Public Money.

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## 5. Guidance for completion of the 3-Year Investment Plan

- 5.1. The 3-year Investment Plan should outline how towns will utilise the first three-years of programme funding, underpinned by evidence of consultation with the local community.
- 5.2. A template for the 3-Year Investment Plan will be shared separately and must be used by all towns for this element of the Plan. The template will include two elements:
  - **3-Year Investment Plan Form**
  - **3-Year Financial and Output Annex**
- 5.3. The Plan must include:
  - The **priorities for investment**, i.e., the challenges and opportunities that community engagement has identified as priority to address across the first three years of the programme;
  - A narrative explaining the **investment themes** (safety and security, high streets, regeneration and town centres and transport and connectivity) that they intend to pursue in the first three years;
  - The specific **interventions** the town intends to pursue in the **first year** of the programme, be that 'on' or 'off' menu; and, where applicable the **powers** as per the policy toolkit that the town will seek to use to deliver and/or supplement this activity.
- 5.4. While not a mandated requirement, where the information is available, towns are encouraged within their 3-year investment plan to outline:
  - The specific **interventions**, be that 'on' or 'off' menu, that they intend to pursue in the **second and third years** of the 3-year investment period;
  - the **powers** as per the policy toolkit that the town will seek to use to deliver and/or supplement this activity.
- 5.5. While not a mandated requirement, where the information is available towns are encouraged to include any '**projects**' that they have identified to be delivered in the first three years of the programme.
- 5.6. Town Boards, supported by the local authority as the accountable body, will be responsible for selecting individual projects to deliver the identified interventions. Projects may constitute funding for a single activity (i.e., refurbishment of a building) or funding for a programme of activities (i.e., a programme of youth activities or a programme of small grants to organisations).



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- 5.7. Towns are not expected to have fully defined 'projects' at the investment plan stage and will not be disadvantaged if they cannot include project level detail in their investment plan.
- 5.8. Once Plans have been approved, information on the interventions for the second and third years of the 3-year investment period, the powers as per the policy toolkit that the town will use to deliver and/or supplement this activity and project-level information will be gathered as part of the wider monitoring processes associated with the programme, detailed further in **Section 10** of this guidance. At these six-monthly review points towns will be asked to summarise provide further detail on the interventions and powers to be used, alongside the projects in receipt of, or planned to receive, funding. Information sought on projects will be high-level and include the following data points:
- Project Name
  - Delivery Organisation
  - Sector of Delivery Organisation
  - Project Location
  - Project Description
  - Status of Project (Awarded/Proposed)
  - Project Start/End Date
  - Project Cost
  - Actual and Forecast Annual Expenditure
  - Associated Match Funding
  - Associated Outputs/Project Milestones
- 5.9. When developing internal systems to select projects and manage the distribution of programme funding, towns should ensure that they collect and collate this data so that it can be easily reported to the department. We will share the format of monitoring returns in due course to support towns in this preparing of data.

#### Financial Breakdown

- 5.10. Towns will be asked to provide an indicative expenditure profile in a form provided by the department.
- 5.11. As a mandatory requirement, the profile submitted must include the following:
- **Investment Themes** – indicative split of RDEL and CDEL expenditure across the three investment themes for Years 1, 2 and 3.
  - **Interventions** – an indicative split of RDEL and CDEL expenditure for 'on' menu interventions within Year 1 only.

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- **Capacity funding** - spend to date and high-level information as to what this was spent on; indicative expenditure for Years 1, 2 and 3.
- **Management costs** – where towns propose to use some programme funding towards management costs, rather than allocating the full amount to interventions, indicative expenditure for Years 1, 2 and 3.

5.12. While not a mandated requirement, where the information is available towns are encouraged to provide the following data: input the following data:

- **Interventions** – an indicative split of RDEL and CDEL expenditure across 'on' and 'off' menu interventions for Years 2 and 3.
- **Project data** - Details of any projects that the Town Board has already selected for funding at the point of submitting their Long-Term Plan.

5.13. The expenditure profile should reflect when the local authority expects to spend, or has spent, the Long -Term Plan for Towns funding on Long-term Plan project or management related activity, in line with their normal accounting practices. Where towns do not yet have information as to the indicative split of RDEL and CDEL expenditure for interventions in years 2 and 3 and the associated project-level data, that will be included within the information as part of the wider monitoring processes associated with the programme.

5.14. When developing the financial forecast, towns should note the following restrictions:

- **Off Menu Expenditure Profiling** - Given the need for 'off menu' activity to be approved via an Outline Business Case process, towns may only profile spending on 'off-menu' interventions from the financial year 2025/26, to allow time for business cases to be developed and considered.
- **Use of Capacity Funding** - Towns should not use capacity funding to pursue delivery of interventions; this funding should be reserved for community engagement and capacity building.

### Management of Funds

5.15. Long-Term Plans must provide assurance to government that public funds will be managed appropriately and in line with relevant standards and legislation. The three-year investment plan must outline how the town will ensure funds are awarded, managed, and monitored fairly and effectively. This should include the following detail:

### Capacity and Capability

5.16. A description of the resource, experience and skills that will support delivery of the 3-year investment plan, including within the local authority and contracted

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resource. This should also detail how capability and capacity is being developed and utilised within the town, e.g., by civic organisations or Town Councils that are supporting the operation of the Town Board by undertaking the secretariat function, or community groups providing thematic knowledge and support.

- 5.17. Areas where the Town Board and/or local authority may require additional support from the High Streets and Towns Taskforce should also be identified, to ensure this is factored into the design of that body.

#### Project Selection

- 5.18. A clear and concise description of how the Town Board will identify, evaluate, and select projects for investment, including how the local authority, acting as accountable body, will support this process and be involved in decision-making. This should also outline how awards to the local authority itself for the delivery of activity proposed by the Board will be evaluated, to ensure a robust and fair process is followed.
- 5.19. Towns should determine the level of information for their application and selection process, accounting for the need to progress the programme at pace while balancing propriety, regularity, value for money and deliverability. The proposed process should consider legal obligations, accountable body, and Fund requirements.
- 5.20. The process should include a clear mechanism for change control, detailing how changes to projects will be managed by the local authority.

#### Awarding Funding

- 5.21. A clear and concise description of how the local authority, as accountable body, will award funding on behalf of the Town Board to organisations delivering the projects, including how they will ensure that relevant obligations are passed on to grant recipients in order to manage performance and ensure compliance.
- 5.22. The local authority can decide how best to manage due diligence, project appraisals, awards to organisations and contractual and payment arrangements (i.e., whether projects are paid in advance, or arrears), however the local authority should be clear about how they will manage performance and obligations around the proper and regular management of the funds in their process.

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### Subsidy Control

- 5.23. A clear and concise description of how the local authority, as accountable body, will ensure the requirements of the Subsidy Control Act (SCA), which came into force in January 2023, will be adhered to in the delivery of the fund.
- 5.24. Each local authority, acting as the accountable body, will be responsible for ensuring that all funding is managed in accordance with the UK's subsidy control regime. Whilst DLUHC has provided funding for a general purpose, the onward use of the funding and the substantive design of potential subsidies will be the responsibility of each local authority.
- 5.25. For each project proposed within a Long-Term Plan, a local authority will be required to:
- assess whether the funding involves the award of a subsidy;
  - where a subsidy is present, complete a more detailed assessment against the subsidy control principles; and
  - upload details of each subsidy award on to the subsidy control transparency database.
- 5.26. The local authority's process should also consider how subsidy control assessments will be completed when the authority is itself the beneficiary of the funding.
- 5.27. Further guidance regarding Subsidy Control for the Long-Term Plan for Towns Programme will be published in due course.

### Procurement

- 5.28. A clear and concise description of how the local authority, acting as accountable body, will ensure that any funds delivered through the programme, including by third parties, will comply with the appropriate public contract regulations when implementing the investment plan, including in the selection of projects.

### Environmental Impact

- 5.29. A clear and concise description of how the town has considered environmental impact in the design of their investment plan, and how the local authority will consider their environmental duty when implementing the investment plan, including in the selection of projects.

### Public Sector Equality Duty

- 5.30. A clear and concise description of how the town has considered public sector equality duty in the design of their investment plan, and how the local authority

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will consider their public sector equality duty when implementing the investment plan, including in the selection of projects.

## Risk

- 5.31. A clear and concise description of how the local authority, acting as accountable body, will manage and mitigate delivery, fraud, and financial risk. It is recommended that Towns conduct a fraud risk assessment and associated response plan related to their Long-Term Plan activity to inform delivery and management of the funding during the programme lifetime. Fraud risks identified through the assessment, and proposed mitigations, should be detailed at high-level in the 3-year investment plan.

## 6. Assessment of Long-Term Plans

- 6.1. Plans will be subject to a light touch assessment by the department upon submission, following the principles of the Green Book five business case model.

Areas for assessment will include:

10 Year Plan	
<b>Strategic</b>	Vision for the local area Local challenges and opportunities Alignment with Intervention List / Off menu proposals Geographical Boundary of investments Alignment with wider strategic investments
<b>Economic</b>	Outputs/Outcomes (Long-term)
<b>Financial</b>	Match funding / Investment opportunities
<b>Management</b>	Governance Stakeholder Engagement

3 Year Plan	
<b>Strategic</b>	Local challenges and opportunities Alignment with Intervention List / Off menu proposals Alignment with wider strategic investments Environmental Impacts Equalities Impact Assessment
<b>Economic</b>	Outputs/Outcomes (Short/medium term)
<b>Financial</b>	Indicative Annual financial Profile split by RDEL/CDEL costs Capacity and management costs

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	Match funding / investment leveraged
<b>Commercial</b>	Deliverability Local project selection process
<b>Management</b>	Governance Capacity & Capability Stakeholder Engagement Subsidy Control Risk Management Delivery Milestones Change Control Procurement

- 6.2. The assessment is non-competitive. It is intended that feedback from it means plans can be approved and funding released.
- 6.3. Where queries or areas of concern are raised during the course of the assessment, the department will either seek further information from the town in order to enable the assessment to continue, or conclude the assessment and set conditions of approval.

## 7. Funding Release

- 7.1. Upon approval of a town's Long-Term Plan, a memorandum of understanding will be agreed between the local authority, as the accountable body, and the department. Following executing of the agreement the first year of programme funding will be released.
- 7.2. Approvals of a Long-Term Plan may be conditional – where pre-contract conditions are included in the approval these must be satisfied prior to the memorandum of understanding being executed.

## 8. Outline Business Cases - 'Off Menu' Interventions

- 8.1. Where 'off menu' interventions are proposed within a town's 3-year investment plan, i.e. interventions not on the published list set out in Annex C of the December 2023 guidance, these will be assessed in principle as part of the assessment of the Long-Term Plan. Where it is agreed that they are acceptable for the town to pursue, the local authority will be required to submit an Outline Business Case to DLUHC **by an agreed date** to evidence the need for the intervention. This will apply regardless of the value of the proposed intervention.
- 8.2. A template for the Outline Business Case will be provided in Autumn 2024.

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- 8.3. Towns **should not** spend 'at risk' on proposed off menu activities; expenditure for such interventions should be profiled in expenditure forecasts from the financial year 2025/26, to allow time for business cases to be developed and considered.

## 9. Monitoring and Evaluation

### Monitoring

- 9.1. The department will monitor progress of Long-Term Plans at town-level by gathering regular monitoring data from local authorities at six-monthly internals, with a more comprehensive progress annually.
- 9.2. The format of monitoring returns will be confirmed in guidance published later in the year; however, the data points below are indicative of the information that the department expects to collect from Towns in monitoring reports and broadly follows the approach taken to other departmental funds, notably the UK Shared Prosperity Fund.
- 9.3. Data points to be collected every six months:
- **Project information:** Updates to admin, investment theme and intervention-level data submitted in three-year investment plan, and the addition of new project-level data (once available), including project title, description, value, location, the funded organisation (and sector), and subsidy status.
  - **Delivery Progress:** An overview of programme and project delivery, including the progress of milestones, and the dates of Town Board meetings.
  - **Finance:** A summary of actual and forecasted expenditure, additional investment leveraged, and projected underspend. Data to be allocated to an investment theme, intervention code and project or listed as unallocated funding.
- 9.4. Data to be collected annually (in December / January):
- **Outputs and outcomes:** Progress of high-level outputs and outcomes as set out in three-year investment plan.
  - **Risks and Issues:** A summary of the key programme and project level risks and issues and how they are being managed by the local authority, and any significant instances of fraud.

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- **Sign-off:** Annual assurance and Value for Money statement to be signed off by S151 officer / CFO, with accompanying narrative.
- **Feedback:** An opportunity to share your experience of the funding programme to support future delivery and policy making.

**Further guidance is included at Annex A of this document.**

## Evaluation

- 9.5. There will be no requirement from DLUHC for local authorities to conduct their own evaluation of Long-Term Plan for Towns funding.
- 9.6. Evaluation activity for the Long-Term Plan for Towns will be led by DLUHC. External contractors may be appointed to conduct fieldwork and analysis as needed. While DLUHC maintain overall responsibility for design and delivery, the evaluation may involve close collaboration with local authorities.
- 9.7. Participation in evaluation activity will not be compulsory for local authorities to receive funding; however, towns will be expected to participate in activities coordinated by the department. These may include, for example, providing additional administrative data, participating in interviews or workshops, and assisting with fieldwork. Invitations to participate will be communicated in advance, outlining any requirements for participation.
- 9.8. An **Evaluation Strategy** will be published later in the year.

## 10. Next Steps

- 10.1 Towns are invited to submit their Long-term Plans in advance of the 1 August deadline where they are sufficiently developed.



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## **Annex A: Long-Term Plan for Towns: Monitoring and evaluation guidance**

### **1. Introduction**

This document provides further guidance on how long-term plans and three-year investment plans will be monitored and evaluated. To note this may be subject to change and further guidance will be published setting out how the fund will be delivered.

This builds on the information in the 'Technical Q&A' published in March 2024, which committed the programme to simplified monitoring and evaluation activities that are proportionate and add value. The Levelling Up White Paper set out the government's ambition for a simple and streamlined funding landscape. High value and targeted funding can unlock the potential of local economies, creating visible improvements within places and communities. We are committed to continually improving the way this funding is delivered and unleashing the potential of our coastal, rural, and urban areas across the United Kingdom.

### **2. Monitoring and evaluation – definitions**

Monitoring and evaluation of the Long-Term Plan for Towns programme will constitute three aspects:

#### **Monitoring**

Data collected at fixed points in time to document the status of projects, monitor progress and facilitate implementation of changes control measures, including tracking whether places are delivering what they said they were going to deliver, when they said they were going to deliver it, and in line with forecast costs.

#### **Reporting**

The gathering, analysis, and presentation of monitoring data to a range of programme stakeholders, at agreed intervals and in agreed formats.

#### **Evaluation**

A systematic assessment of the effectiveness of the Programme's delivery, its impact, and its value for money. This typically consists of gathering and analysing data to inform learning, identify value, and impact, and inform future decision-making. This may include:

- Process evaluation: To explore what worked well, and what did not work as intended, why, and in what circumstances, in the design and delivery of the fund.
- Impact evaluation: To assess what changes have occurred to the outcomes in question, the scale of those changes and the extent to which they can be attributed to the intervention.

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- Value for money evaluation: To understand if the programme delivered value for money.

### 3. Monitoring approach

#### Aim

The aims of programme monitoring activities will be to:

- document the progress of spend in towns and confirm that it is within agreed parameters;
- capture the progress of delivery so that achievements and success can be celebrated and coordinated, and intervention or support can be provided where required; and
- confirm that the assurance and accountable body responsibilities of the local authority are being met.

#### Reporting cycle

Local authorities will be required to provide data every six months. Reporting windows will be in December / January and June / July of each year, beginning in June 2025. Receipt of the data return in December / January will be a pre-requisite to the release of funding for the next financial year. An indicative reporting cycle is provided in Figure 1 below.

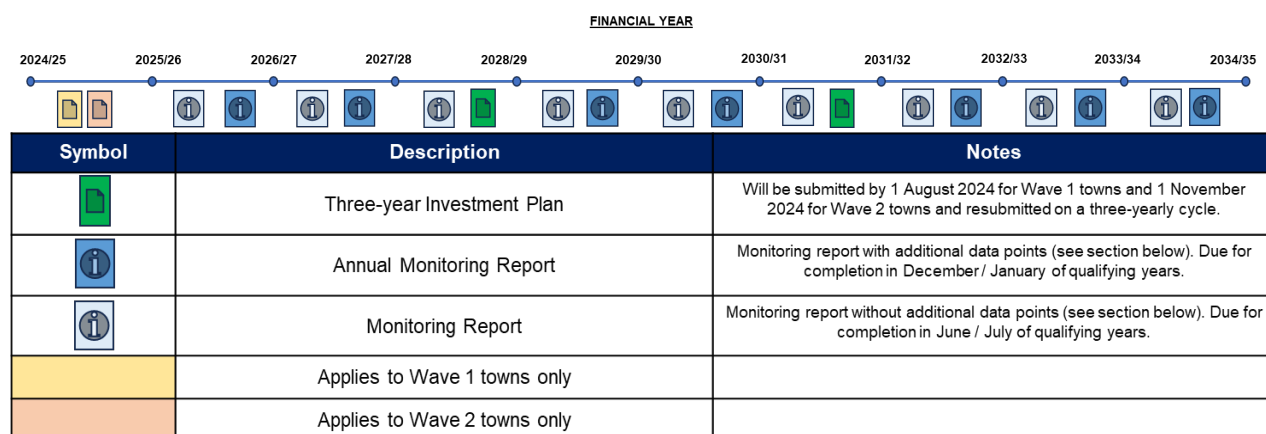


Figure 1: Indicative reporting cycle

Programme and project monitoring activities will conclude three years after the end of the final three-year investment cycle. Local authorities may obtain the data requested in the monitoring template from various sources. It is anticipated that most of the data will be gathered through primary data collection. In some instances, project partners may provide data. In all such instances, it will remain the responsibility of the local authority as the accountable body to report the data through the required monitoring processes.

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## Types of Data

The data points below are indicative of the information that we would expect to include in monitoring reports.

Data points to be collected every six months:

- **Project information:** Updates to admin, investment theme and intervention-level data submitted in three-year investment plan, and the addition of new project-level data (once available), including project title, description, value, location, the funded organisation (and sector), and subsidy status.
- **Delivery Progress:** An overview of programme and project delivery, including the progress of milestones, and the dates of Town Board meetings.
- **Finance:** A summary of actual and forecasted expenditure, additional investment leveraged, and projected underspend. Data to be allocated to an investment theme, intervention code and project or listed as unallocated funding.

Data to be collected annually (in December / January):

- **Outputs and outcomes:** Progress of high-level outputs and outcomes as set out in three-year investment plan.
- **Risks and Issues:** A summary of the key programme and project level risks and issues and how they are being managed by the local authority, and any significant instances of fraud.
- **Sign-off:** Annual assurance and Value for Money statement to be signed off by S151 officer / CFO, with accompanying narrative.
- **Feedback:** An opportunity to share your experience of the funding programme to support future delivery and policy making.

Reflecting our commitment that this programme remains proportionate in its ask of towns, we will also introduce 'minimum project value thresholds', i.e., we will only ask towns for the full suite of data for projects above a specific value, for projects below that threshold, there will be a lower requirement in terms of the provision of data. To determine an appropriate threshold, we will utilise the 'project-level' data towns include in their Long-Term Plan, to make a judgment as to where we set that. In the interim, we will request that towns retain project-level data for all awards made.

## Next steps

Further, detailed guidance on monitoring requirements and change control will be published ahead of 1 August.

## 4. Evaluation

DLUHC plays a pivotal role in advancing the government's levelling up agenda, striving to create equal opportunities for individuals throughout the UK, irrespective of their socio-economic background or geographical location. Within the scope of this

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ambitious agenda, DLUHC is committed to evaluation as a valuable activity to generate learning and ensuring transparency to stakeholders on the effectiveness of DLUHC's programmes. The evaluation work for the Long-Term Plan for Towns will be led by DLUHC. Evaluation activities will be commissioned externally to ensure an additional level of independence and impartiality.

### **Evaluation purpose**

The purpose of the Long-Term Plan for Towns evaluation will be to contribute to an evidence-base of what works, in what context, and by what means in support of levelling up outcomes. The evaluation will not be intended to hold local authorities and Town Boards accountable for their selection or implementation of interventions within their Long-Term Plans.

The lessons learned will serve as a valuable resource for DLUHC, local authorities, Town Boards and other stakeholders. It could help improve understanding on, for example, effective approaches for designing and implementing long-term local growth funds and interventions, as well as best practices for building leadership and partnerships in local communities.

The focus of the evaluation will be determined during further scoping.

### **Evaluation approach**

A scoping exercise will be used to define the evaluation questions and methodology. The evaluation will focus on novel elements of the programme design and will aim to contribute to growing the evidence base of 'what works' for local growth. This focused approach will ensure the findings are complementary to DLUHC's ongoing portfolio of local growth evaluations whilst addressing evidence gaps.

### **Local authority participation in evaluation activity**

There will be no requirement from DLUHC for local authorities to conduct their own evaluation of Long-Term Plan for Towns funding.

Evaluation activity for the Long-Term Plan for Towns will be led by DLUHC. External contractors may be appointed to conduct fieldwork and analysis as needed. While DLUHC maintain overall responsibility for design and delivery, the evaluation may involve close collaboration with local authorities.

Participation in evaluation activity will not be compulsory for local authorities to receive funding, however, places will be expected to participate in activities coordinated by the department. These may include, for example, providing additional administrative data, participating in interviews or workshops and assisting with fieldwork. Invitations to participate will be communicated in advance, outlining any requirements for participation.

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DLUHC recognises the number of ongoing local growth evaluations, wherein local authorities may have been selected for case studies. DLUHC will consider any overlaps in areas involved in evaluations and minimise the burden on participating local authorities, prioritising places that are not currently part of evaluations, where possible. DLUHC also acknowledges the potential challenges faced by some local authorities regarding the demands of participation in evaluation. In such instances, DLUHC is committed to minimise burdens, ensuring that participation is manageable, and facilitating the involvement of as many local authorities as possible.