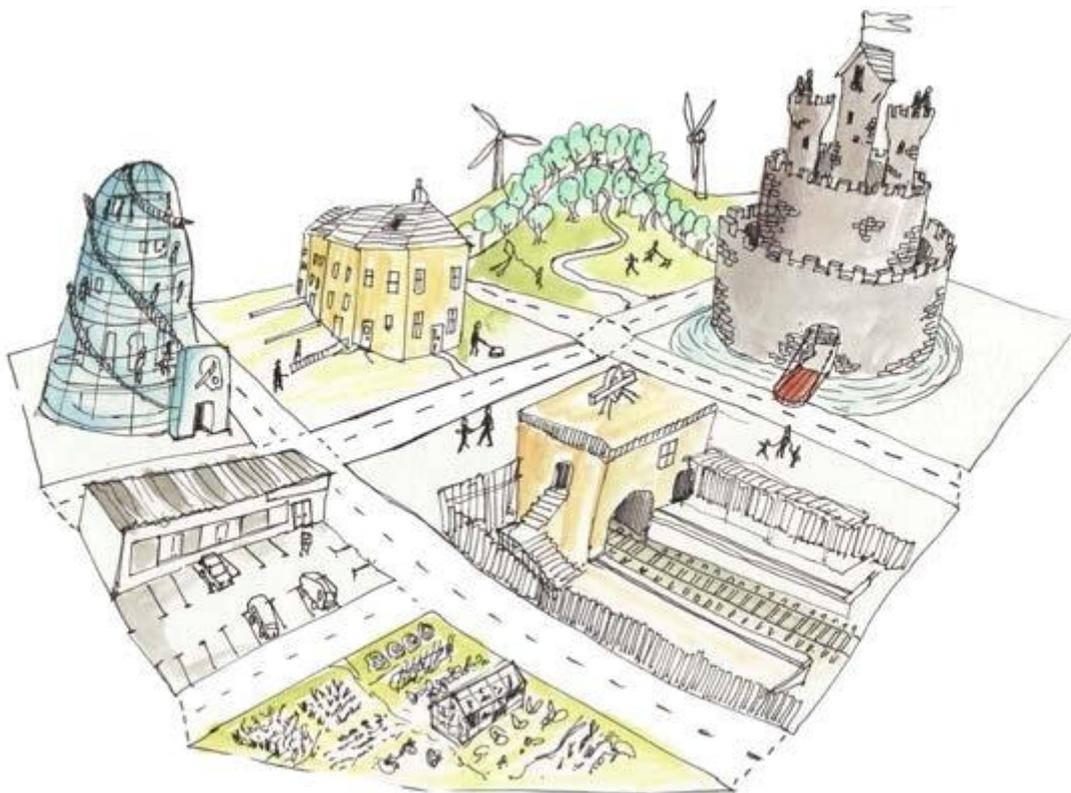




Ministry of Housing,
Communities &
Local Government

How to assess and allocate sites for development

A toolkit for neighbourhood planners





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Introduction

This toolkit is aimed at neighbourhood planning groups who are intending to allocate sites for development in a neighbourhood plan. It explains the principles for allocating sites and the methods that should be applied to make sure the sites that are chosen are the most appropriate for the neighbourhood.

If you are new to neighbourhood planning you are encouraged to read the Neighbourhood Planning Roadmap, which sets out in a step by step guide the process of preparing a neighbourhood plan.

Benefit of carrying out a site assessment

Neighbourhood plans can identify and allocate sites for new development including housing, employment, business use, leisure and other forms of development. They can also protect and safeguard land for future uses such as open space.

Allocating sites is one of the most powerful, but also most contentious aspects of neighbourhood planning. Groups can expect challenge but there are also many benefits, including bringing forward sustainable development to meet local needs, influencing the location, type and design of new development coming forward, providing new infrastructure and services for the benefit of the community and retaining more of the money collected from development to spend on local projects. With a clear process and careful site assessment you will feel more confident at presenting your work, not only at the end, but also at various stages in the site assessment process.

Carrying out a site assessment will provide the evidence that the sites selected for allocation are the most appropriate – that they are in the most sustainable location, they are in general conformity with the strategic policies of the Local Planning Authority's (LPA) local plan¹ and that there is a good prospect that they will be developed.

Sites can then be proposed for allocation in the neighbourhood plan, which will establish the principle for a particular form of development in that location. At the end

¹ A Local Planning Authority (LPA) is a local government body responsible for formulating planning policies and controlling development; a district council, metropolitan council, a county council, a unitary authority or national park authority. A Local Plan sets out the development framework for the Local Authority area.

of the process you will have a site or sites that you can demonstrate to an examiner has been thoroughly and impartially assessed for suitability.

This process will also allow you to 'tell the story' of how the sites that are chosen for allocation were selected, and why others were not. This will help to demonstrate to the community and to landowners and developers who may be promoting other sites, the basis on which the decisions were reached.

Understanding the development need

Before you select which sites may be suitable for future development, and what type of development would be appropriate, it is important to understand what the development need for the neighbourhood plan area is.

Paragraph 69 of the National Planning Policy Framework (NPPF) requires the LPA to set out in its strategic policies the housing requirement for the wider local plan area, as well as for designated neighbourhood areas.

This may not however always be possible (because a neighbourhood area is designated at a late stage in the strategic policy-making process, after strategic policies have been adopted or where strategic policies for housing are out of date). Paragraph 70 of the NPPF requires, in these instances, the LPA to provide an indicative figure if requested to do so by the neighbourhood planning group. The housing requirement for a designated neighbourhood area will reflect the overall strategy for the pattern and scale of development and any relevant allocations.

You could also undertake a review of the documents relating to development need which form part of the LPA's local plan evidence base, for example the Housing and Economic Market Needs Assessment (HEMNA).

In addition, or if a development figure has not been provided by the LPA, you may choose to carry out a housing needs assessment of the neighbourhood plan area. This can also help to understand the type of development that is needed locally, e.g. family housing or housing for older people. Support for neighbourhood planning groups in understanding development needs can be sought from the local planning authority or an appointed planning professional.

To understand employment land demand, the LPA's Employment Land Review² or a similar evidence document would provide an indication of the supply of, and demand for, business land and premises in the area. In addition, a business needs survey may be useful to establish what the local employment land demand is estimated to be.

More information can be found in the Neighbourhood Planning housing needs assessment toolkit.

Once the housing requirement has been established, the remaining requirement should be confirmed (sometimes called the residual housing requirement). This figure is the number of homes required in the neighbourhood plan area after subtracting the number of homes that have been built (known as completions) since the beginning of the local plan period as well as land with current planning permission or allocated in adopted development plans for development (known as commitments) that have been confirmed since. This should be discussed with your LPA to ensure there is no double counting or gaps between the local plan and neighbourhood plan housing supply figures.

Housing Land Supply

The housing land supply is the amount of land within a defined area that is suitable and available for development; and where development would be achievable (economically viable).

An LPA is required to have a supply of specific deliverable sites sufficient to provide 5 years' worth of housing against a housing requirement set out in adopted strategic policies, or against a local housing need figure. If an LPA cannot demonstrate a 5 year land supply, this triggers the presumption in favour of development³.

However, the NPPF (paragraph 14) includes protection for designated neighbourhood areas from speculative development. This applies to neighbourhood plans that meet the following criteria: the neighbourhood plan became part of the development plan

² Employment Land Reviews set out the overall employment land demand and supply for an LPA area. This can be used by neighbourhood groups to understand what the demand is for particular types of employment use in an area and also whether the existing employment sites are required or are potentially suitable for release for other uses.

³ NPPF Paragraph 11 states that "Plans and decisions should apply a presumption in favour of sustainable development... For decision-taking this means: c) approving development proposals that accord with an up-to-date development plan without delay; or d) where there are no relevant development plan policies, or the policies which are most important for determining the application are out-of-date, granting permission unless: i. the application of policies in this Framework that protect areas or assets of particular importance provides clear reason for refusing the development proposed; or ii. any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole".

five years or less before the date on which the decision is made and the neighbourhood plan contains policies and allocations to meet its identified housing requirement.

A neighbourhood plan can allocate additional sites to those in a local plan or plan for more housing than the housing requirement figure, where this is supported by evidence to demonstrate need above that identified by the LPA or published evidence (see paragraph 44 of the Neighbourhood Planning section in the Planning Policy Guidance or PPG. The level of development to be planned for in a neighbourhood plan should be discussed with the LPA, particularly where a local plan is out of date or a housing requirement figure has not been provided.

Part 1: Site Assessment

How to carry out a site assessment

The Site Assessment process diagram below sets out a suggested approach. This is a generic process and may need to be tailored to suit the circumstances of the specific neighbourhood area.

The site assessment involves an appraisal of each potential development site to establish:

- whether it is suitable, available and achievable (viable) for development in principle; and, if so
- whether it would be appropriate to allocate in the neighbourhood plan.

However, before you start your site identification process it is important to understand the wider planning context for the neighbourhood area.

Site Assessment process

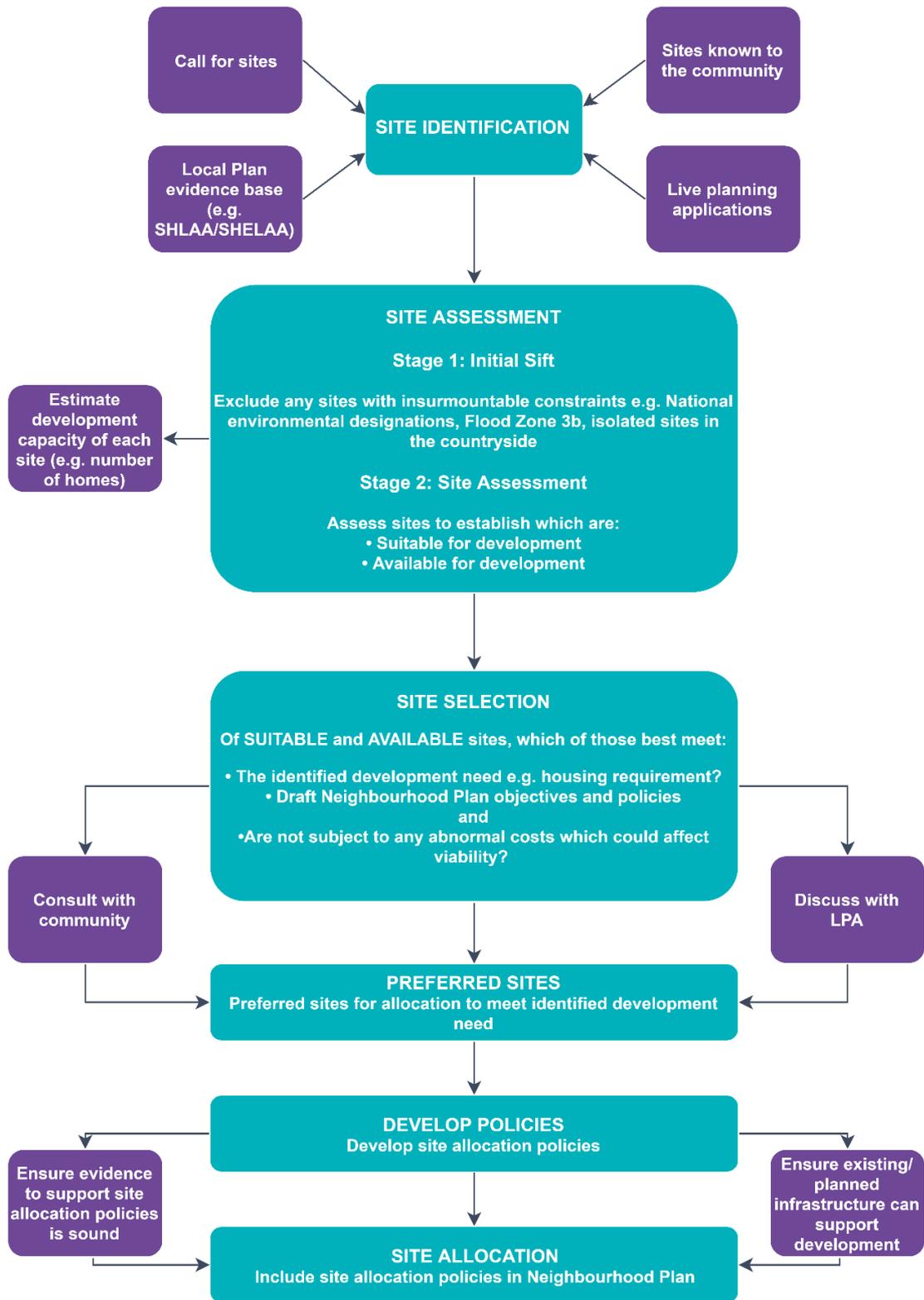


Figure 1: Site Assessment Process

Understanding the context: Planning policy and general conformity with the local plan

The site selection process should be carried out in an open and transparent way, including consultation with the community. Evidence will be necessary to support and justify the selected sites and the reasons why some sites have been selected over others.

All policies included in the neighbourhood plan should not duplicate or restate what is included in national policy and the LPA's local plan. Draft neighbourhood plans or orders are not tested against the policies in an emerging local plan, but the reasoning and evidence informing the local plan process is likely to be relevant to the consideration of the basic conditions⁴ against which a neighbourhood plan is tested.

The neighbourhood planning group should work with the LPA to ensure consistency between, and avoid duplication of, sites allocated in neighbourhood plans and local plans. This is to avoid double counting of allocations in monitoring progress against the development requirement. It is also likely the Examiner will delete any duplicate policies.

MHCLG has produced guidance to assist with the identification of appropriate land to meet development needs as well as specific guidance on neighbourhood planning, including how to include site allocations in a neighbourhood plan. These should be read in combination with this toolkit.

Different types of site allocations

Sites can be allocated for different types of land use, including:

- residential – by different tenures, types and needs of different groups such as older people's housing, private rented housing and people wishing to build or commission their own homes,
- economic development uses – retail, leisure, cultural, office, warehousing etc., or
- a mix of the above.

⁴ Only a draft neighbourhood plan or order that meets each of a set of basic conditions can be put to a referendum and be made. The basic conditions are set out in paragraph 8(2) of Schedule 4B to the Town and Country Planning Act 1990 as applied to neighbourhood plans by section 38A of the Planning and Compulsory Purchase Act 2004. See PPG Paragraph: 065 Reference ID: 41-065-20140306

There are different ways in which sites can be included in a neighbourhood plan.

A site can be allocated for development, which means it is identified for a particular type of land use, e.g. housing, employment, business use, leisure or a community facility, and this will be used to determine any planning application that is proposed for the site. In order to allocate a site for development you will need to be able to demonstrate the site is:

- **deliverable**- means development is achievable within the first five years of the plan period. Unlike policies, which only need to be deliverable within the chosen time frame for the plan, an allocation is deliverable where development is achievable within the first 5 years of the plan period.
- **suitable**- means land which does not have significant environmental, physical or policy constraints to development.
- **available (for development)** – means that, on the best information available (this will be confirmed by the call for sites and information from landowners and legal searches where appropriate), there is confidence that there are no legal or ownership problems, such as unresolved multiple ownerships, ransom strips, tenancies or operational requirements of landowners. This will often mean that the land is controlled by a developer or landowner who has expressed an intention to develop or the landowner has expressed an intention to sell. The existence of a planning permission does not necessarily mean that the site is available.
- **economically viable** - means that, after taking account of all costs including central and local government policy and regulatory costs and the cost and availability of finance, the scheme provides an adequate return to the developer to ensure that development takes place and generates a land value sufficient to persuade the landowner to sell the land for the development proposed or deliver the allocated development themselves.

If a site cannot be delivered within the first five years of the plan period but could be delivered sometime from year 6 until the end of the plan period it is considered to be developable.

Where you cannot demonstrate that a site is deliverable, for example it may be in a good location but there is no evidence to suggest that it could become available, your neighbourhood plan can identify 'aspirations' or projects for sites you would like to see developed, and set out principles or policies for each site that would be supported by the neighbourhood plan.

This is not an allocation and therefore does not count towards a development requirement but is a valuable way of communicating the community's wishes to prospective developers and can include a list of community benefits such as new infrastructure that would be sought through the development of the site.

If there are sites that have been assessed as suitable, available and achievable, but are not selected as the preferred options to meet the identified need, they can be identified as 'reserve' or 'contingency' sites which could be allocated in future revisions of the neighbourhood plan if the preferred sites did not come forward as expected, or if additional development is required in the future.

Green spaces can also be designated for protection from future development. This is known as a local green space designation and can include, for example, sites of open space value, sites of nature conservation value or sites of amenity value. There would need to be evidence to support this designation, and it would only be appropriate to designate a local green space if this would afford greater protection than that already provided by the local plan.

The designation should only be used where the green space is:

- In reasonably close proximity to the community it serves,
- demonstrably special to a local community and holds a particular local significance, for example because of its beauty, historic significance, recreational value (including as a playing field) tranquillity or richness of its wildlife, and
- local in character and is not an extensive tract of land (NPPF Para 107).

You can find out more information on how to make local green space allocations in our green space designation toolkit and PPG on open space, sports and recreation facilities.

If a site is already allocated in the local plan, it does not need to be re-allocated in the neighbourhood plan. However, it is useful to include any local plan allocated sites on a map in the neighbourhood plan, so all future housing sites within the neighbourhood plan area are shown.

Housing Type, Tenure and Mix

An allocation for housing can consider what type⁵, tenure⁶ and mix of housing⁷ would be expected to support a range of household types and sizes. This should be linked to both the neighbourhood level housing needs evidence e.g. from a housing needs survey⁸ or housing needs assessment⁹, and also the local plan evidence including the local plan requirements for housing mix and tenure, where a plan is 'up to date'. Where a plan is older than 5 years, unless a review finds it is still up to date, the plan figure should no longer be used as a housing requirement, and instead the Local Housing Need standard method should be used.

Neighbourhood plans must provide housing in accordance with the local plan policies regarding affordable housing.

If any specific housing needs are identified through the evidence base, neighbourhood planning groups may wish to consider these and include policies to bring forward development to meet these needs.

Table 1 sets out examples of different groups with specific housing needs, the evidence that would typically be required to support their provision and potential planning policy responses to them.

Providing housing for these groups could either be dealt with through a planning policy that generally supports the principle of a particular type of housing to meet the identified need or through a policy that allocates a specific site for a particular type of residential development.¹⁰

⁵ For example, detached, semi-detached, terraced or apartments.

⁶ For example, owner occupied, private rented, social rented.

⁷ The range of house sizes expected in a development (1-bed, 2-bed, 3-bed, 4+-bed).

⁸ Survey to the local community asking for thoughts and opinions on housing need matters.

⁹ Assessment of the local housing market, which studies the supply and demand of housing, housing and planning policies, the need for affordable housing and the affordability of the local housing market. This is a desk based exercise.

¹⁰ For an example of a policy which supports delivery of a particular type of housing, see Ashton [Keynes Neighbourhood Plan](#), Policy HSP6 Housing for Older People (Made May 2017)

If the neighbourhood planning group decides to allocate a particular site for a particular type of housing, this should be supported by the landowner/site promoter as it will need to be established that the specialist use would not impact on site viability.

Table 1: Groups with specific housing needs and potential

Neighbourhood plan policies

Groups with specific housing needs	Evidence	Potential Policy
Households requiring affordable housing	LPA Housing Market Assessment Housing Needs Survey Housing and Economic needs assessments Housing and Economic land availability Assessments	Affordable housing policy Rural exception site policy (generally supporting the principle of this particular type of housing and not allocating)
Families with children	LPA Housing Market Assessment Housing Needs Survey Housing and Economic needs assessments	Housing mix policy (setting out a mix of house sizes: % of 1-bed, % of 2-bed etc.)
Older people	LPA Housing Market Assessment Housing Needs Survey Housing and Economic needs assessments	Adaptable housing policy Sheltered/Extra-care housing policy Sheltered/Extra-care housing site allocation policy
Students	LPA Housing Market Assessment	Student housing policy

	Housing Needs Survey Housing Needs Assessment	Student housing site allocation policy
People with disabilities	LPA Housing Market Assessment Housing Needs Survey Housing and Economic needs assessments	Adaptable housing policy Requirement within a site allocation policy
Service families	LPA Housing Market Assessment Housing Needs Survey Housing and Economic needs assessments	Key worker accommodation policy
Gypsies and Travellers	LPA Gypsy and Traveller's Accommodation Needs Assessment Housing Needs Survey Housing and Economic needs assessments	Gypsy and travellers accommodation policy Gypsy and travellers site allocation policy
People who rent their houses	LPA Housing Market Assessment Housing Needs Survey Housing and Economic needs assessments	Private rent sector policy Private rent sector site allocations

Self-builders	LPA Self-build and custom housebuilding register ¹¹	Self-build policy Self-build site allocation policy
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Rural Exception Sites

Rural exception sites are small sites used for affordable housing in perpetuity where sites would not normally be used for housing, i.e. sites that are located outside of, but well related to, existing settlements and their services and facilities. Neighbourhood development plans can include a planning policy that supports the principle of rural exception sites.

Rural exception sites seek to address the needs of the local community by accommodating households who are either current residents or have an existing family or employment connection. Rural exception site policies are justified when there is an identified local need for affordable housing, for example by a Housing Needs Assessment.

If a policy supports the principle of rural exception sites, the policy wording can require any planning applications for development of rural exception sites to be accompanied by a Housing Needs Assessment that justifies the need for the houses and their location outside the built-up area boundary/settlement boundary.

Whilst the aim of rural exception sites is to deliver affordable housing to meet a local need, a proportion of market homes may be allowed on the site at the local planning authority’s discretion, for example where essential to enable the delivery of affordable units without grant funding.

¹¹The Self-build and Custom Housebuilding Act 2015 (as amended by the Housing and Planning Act 2016) requires each relevant authority to keep a register of individuals and associations of individuals who are seeking to acquire serviced plots of land in the authority’s area for their own self-build and custom housebuilding (referred to in this guidance as self-build and custom housebuilding registers).

Site Identification process

Setting up a site identification working group

A working group should be set up to carry out the site assessment process. This would ideally be a core group who are involved in the assessment of each site, to ensure consistency. Each member should declare any interests and also avoid assessing sites that they may have an interest in (e.g. living or owning property in close proximity to the site).

Identifying all possible sites

The next stage in selecting sites to meet the identified development need is to look for any possible sites with development potential. Casting the net as wide as possible is important to ensure the most appropriate sites are allocated and also in the event of your plan being challenged by landowners or developers who own or control sites they consider deliverable. If these are not considered and objectively assessed, the plan may be at risk.

Sites that should be considered include:

- Sites known to the community,
- Sites identified through a 'call for sites' exercise,
- Sites identified through a local plan evidence base document, such as a Housing Land Availability Assessment/ Housing and Economic Land Availability Assessment, and
- Sites that are subject of a current planning application.

The submission of a planning application is an indication that the site is available for development. Planning applications may be determined before the submission of a neighbourhood plan, in which case the site would no longer need to be allocated. It is however best practice to consider all known sites with potential for development in the site assessment. It is also useful to look at planning applications and planning permissions in terms of how they would affect the suitability of the other sites being considered in the assessment, e.g. a site that is separated from a settlement could become contiguous with the settlement if land between the site and settlement is given planning permission for development.

Sites that are allocated or proposed for allocation in the adopted or emerging local plan should also be identified to understand the existing policy context for the neighbourhood area. These are usually found in a site allocation document. These allocations should not be duplicated in the neighbourhood plan. Coordination with the local planning authority on site identification is therefore recommended.

Call for Sites

Neighbourhood planning groups can initiate their own 'Call for Sites' at this stage, particularly if the last local authority one was more than 2-3 years ago. This is an invitation for any resident, landowner, business, developer or agent to submit a site or sites for consideration in the neighbourhood plan. This can be advertised through a door to door leaflet drop, on the neighbourhood plan and LPA website, on local noticeboards, in local newspapers and through social media. A simple Call for Sites template might request the following:

- Site name
- Site address
- Site plan (showing 'red line' boundary around the site)
- Ownership
- Site area (in hectares)
- Expected number of units
- Timescales for development, e.g. available now or at some point in the future
- Any barriers to delivery, e.g. legal issues, contamination

Engagement with landowners at the earliest opportunity can help overcome possible conflicts. Your LPA will be able to advise on managing this type of engagement, helping to ensure that the process is transparent and objective. Most groups find that individual meetings with landowners and developers who are putting forward sites is the most productive approach. A failure to engage with landowners may result in late-stage delays to your plan or impede it having the desired impact.

By the end of the identification stage, you should have a list of sites to be considered for their development potential. This is the site assessment stage and is considered in detail below.

Existing information including the local plan evidence base

As a first step, you should check the LPA's adopted and emerging local plan, and any associated site allocations documents, to check whether there are any sites already allocated or proposed for development in the neighbourhood plan area.

The site selection process should also use the LPA's most recent Housing Land Availability Assessment, sometimes called a Housing Land Availability Assessment (HLAA) or Housing and Economic Land Availability Assessment (HELAA) as a starting point.

This is an assessment of all potential sites for housing (and sometimes employment uses), including sites that have been put forward by land-owners and developers

within the local authority area, and provides an indication of whether each assessed site is deliverable within the local plan period.

You should check the report to establish whether there are any sites identified within your neighbourhood plan area, and what conclusions are reached. If a neighbourhood plan allocates sites that were found “not developable” in the HELAA, you will need evidence to justify the allocation, for example new information that has come forward. Likewise, you will need evidence to justify why sites in the HELAA that have been assessed as “deliverable” / “developable” have not been included as site allocations in the neighbourhood plan¹².

However, HELAA reports are often ‘high level’ and if more information or more recent evidence is available which indicates a different conclusion than that contained in a HELAA for a site, this can be used to justify site allocations proposed within the neighbourhood plan. Neighbourhood plans can also include small sites, for example sites for up to 5 houses. HELAAs that have not recently been updated often discount smaller sites.

It should also be noted that while a HELAA sets out all land with potential for housing, it does not mean that all deliverable sites in a HELAA should be allocated.

¹² The NPPF states that: To be considered deliverable, sites for housing should be available now, offer a suitable location for development now, and be achievable with a realistic prospect that housing will be delivered on the site within five years. In particular sites which do not involve major development and have planning permission and all sites with detailed planning permission, should be considered deliverable until permission expires, unless there is clear evidence that homes will not be delivered within five years (for example because they are no longer viable, there is no longer a demand for the type of units or sites have long term phasing plans. Also, where a site has outline planning permission for major development, has been allocated in a development plan, has a grant of permission in principle, or is identified on a brownfield register, it should only be considered deliverable where there is clear evidence that housing completions will begin on site within five years. (NPPF Glossary) *and* To be considered developable, sites should be in a suitable location for housing development with a reasonable prospect that they will be available and could be viably developed at the point envisaged. (NPPF Glossary).

Site Assessment Stage 1 – Initial Sift

An initial ‘sift’ of the sites is recommended, to eliminate any sites that are clearly unsuitable for development because of insurmountable physical or policy constraints. It is important that the reasons for excluding sites are fully justified and recorded and should only include the reasons set out in Table 2, or any other factors agreed with your LPA.

Table 2: Factors that could be used to exclude sites from the site assessment

Factor	Guidance
Environmental/Physical	
<p>Site predominantly, or wholly, contains a site of Special Scientific Interest (SSSI)</p>	<p>Given legislative protection, no significant adverse effects could be tolerated.</p> <p>A conservative approach should be applied, which assumes that sites intersecting by <50% could be designed to avoid effects.</p> <p>NPPF – Para 193(b) states that development on land within or outside a SSSI (which is likely to have an adverse impact on it) should not normally be permitted.</p> <p>Locations, boundaries and Impact Risk Zones of SSSIs are available to view on DEFRA’s Magic Map: https://magic.defra.gov.uk/magicmap.aspx</p>
<p>Site predominantly, or wholly, contains a European Nature Conservation Site (Special Area of Conservation – SAC)</p>	<p>Given legislative protection, no significant adverse could be tolerated.</p> <p>A conservative approach should be applied, which assumes that sites intersecting by <50% could be designed to avoid effects.</p>

	<p>Locations and boundaries of SACs are available to view on DEFRA's Magic Map: https://magic.defra.gov.uk/magicmap.aspx</p>
<p>Site is predominantly, or wholly, within Flood Zones 2 or 3</p>	<p>The NPPF sets out strict tests to protect people and property from flooding which all local planning authorities are expected to follow. Where these tests are not met, new development should not be allowed.</p> <p>NPPF Para 170-182 sets out a sequential, risk-based approach to the location of development which is designed to ensure that areas at little or no risk of flooding from any source are developed in preference to areas at higher risk.</p> <p>Qualifying bodies involved in neighbourhood planning will need to ensure all plans and orders are informed by suitable assessment of flood risk both now and in the future and steer development to areas of lower flood risk as far as possible; They will need to set out how flood risk will be managed in their plan area so flood risk will not be increased and opportunities to reduce flood risk are included. PPG Paragraph: 015 Reference ID: 7-015-20220825</p> <p>The extent of Flood Zones is available to view on the Government's website: https://flood-map-for-planning.service.gov.uk/</p> <p>If there are no "suitable" sites within your neighbourhood area, you should speak to the LPA about the potential of undertaking a Sequential Test.</p>

National Policy (NPPF)	
Site which, if developed, would create isolated homes in the countryside, as defined by NPPF Paragraph 84, unless the circumstances set out in Para 84 apply	Planning policies and decisions should avoid the development of isolated homes in the countryside unless one or more of the circumstances apply in para 84 of the NPPF.
Sites partially or wholly within Green Belt	<p>Sites within the Green Belt should only be included in a neighbourhood plan site assessment if the need for green belt release has been established through the local plan.</p> <p>An LPA wide Green Belt review should be referred to as a starting point.</p> <p>Inclusion of green belt sites in a site assessment should be discussed with the LPA.</p>
Local Policy (adopted and emerging)	
A local plan site (often on a medium to large scale) is identified in a local plan which is not within the influence of a neighbourhood plan.	Adopted and emerging local plan / LPA
Site would be contrary to local plan policies on location of growth, e.g. where a local plan states that housing within a particular type of settlement would only be acceptable within or adjacent to the settlement.	Adopted and emerging local plan / LPA

Site Assessment Stage 2 – Site Assessment

The remaining sites that pass the first sift should be taken forward for detailed assessment. An example of a site assessment template can be found separately in Appendix A. You can also find the blank template separately in Appendix B that you can use when undertaking your site assessment.

This can be adapted to include any local designations or local criteria that would affect the suitability of the site, but care should be taken to ensure any additional criteria does not discriminate against one or more particular sites and the same criteria and scoring method is used for each site to ensure consistency.

The site assessment template is designed to demonstrate that a site is suitable, available and economically viable and that there is a good prospect the site will be delivered; these are explained in the boxes below. The completed site assessment should include the information to justify the conclusions.

The template is designed to shortlist the sites that are suitable and available for development and highlight any likely viability issues. From here, the preferred sites for allocation should be selected based on which of the shortlisted sites best meet both the development need, e.g. the housing requirement, and the objectives and draft policies of the neighbourhood plan.

Site Availability

Is the site available for development?

A site can be assessed as available if there is evidence that a landowner or developer is willing to sell or develop the site at a known point in the future, and within the plan period. Any legal or ownership issues should also be taken into account, such as multiple ownership.

Sites submitted through a Call for Sites consultation are considered available, as are sites allocated in the local plan or assessed as available in a recent HLAA or HELAA.

The LPA may be able to provide land ownership information. If landownership is unknown, a search of the Land Registry website (for a small fee) can provide land ownership details which can be used to make enquiries.

Site allocations in the plan should include an indication of the expected timescale for delivery, for example years 0-5, or 6-10 of the plan period. This may depend on the landowner/ developer's timescales, an existing use to be relocated or a long lease, development lead-in times and delivery rates, or if there are mitigation measures or legal obstacles to overcome.

Is the development achievable

Is the site economically viable for development?

There are two aspects of viability that should be considered:

The first refers to the overall level of development proposed in the plan and to ensure that the necessary infrastructure will be in place to support development, e.g. highways and public transport improvements, utilities such as water and sewerage and social infrastructure such as health and education.

If the local plan has set a housing requirement for a neighbourhood area, then the onus is on the LPA and other relevant authorities including infrastructure providers to ensure the infrastructure provision is sufficient to support the level of development proposed.

If the neighbourhood plan is proposing development based on its own identified need, the onus is on the neighbourhood plan to demonstrate that the necessary infrastructure will be provided to support the development. This should be discussed with the LPA and the landowners.

The second is the viability of the proposed sites. This refers to the ability of the developer to deliver the scheme and, in particular, whether the financial returns on the site will be sufficient for the developer to go ahead with the development.

There are a number of things a group can do to establish whether a site is likely to be viable:

- Speak to the LPA about any evidence that exists to indicate the viability of development in the proposed location. This could include local plan evidence base reports such as a whole plan viability report or an affordable housing viability report.
- Ask each developer for evidence that they can deliver a scheme that would comply with current local plan policy on e.g. affordable housing, open space and parking requirements, as well as Community Infrastructure Levy (CIL) or any other planning obligations.

- Ask each developer if they can provide evidence of the viability of any additional benefits that have been promised (such as public open space, community buildings, education or healthcare buildings), including anything the neighbourhood plan group have requested.
- For sites which are being actively promoted by a landowner/developer/agent, ask whether, based on the PPG section on viability, they can provide evidence of the viability of the scheme.

To find out more about site viability, have a look at the [Neighbourhood planning viability toolkit](#).

Other considerations

Before sites are allocated, there are a number of other issues that should be considered as part of the neighbourhood plan.

Strategic Environmental Assessment

The inclusion of site allocations in a neighbourhood plan is likely to mean a strategic environmental assessment (SEA) is needed. An SEA is a formal assessment of the environmental effects of a neighbourhood plan. This can be very useful in providing objective information for local residents and businesses on the positive and negative environmental effects of your site and wider policy proposals.

SEA 'screening' by your LPA should be undertaken as soon as sufficient information on the potential environmental effects of the neighbourhood plan is known. As a minimum, your LPA is likely to require the aims of the plan, a list of potential policies and whether the plan intends to allocate sites. You can find more information on screening neighbourhood plans for SEA in the Screening Neighbourhood Plans for Strategic Environmental Assessment toolkit.

Habitat (Regulations) Assessment

Habitat (Regulations) Assessment (HRA) is an assessment regarding the impact of a plan on internationally important wildlife sites. An HRA will provide the LPA with the evidence they need to draw conclusions regarding effects on internationally important wildlife sites. It will also assist the neighbourhood planning group with removing any clashes with such sites (e.g. an adverse water quality effect on an international wildlife site from a proposed allocation in a draft neighbourhood plan) before they submit their plan to the LPA.

In April 2018, the Court of Justice of the European Union clarified that it is not appropriate to take account of mitigation measures when screening plans and projects

under the Habitats Directive. This means if a likely significant effect is identified at the screening stage, an 'Appropriate Assessment' must be undertaken.

An additional basic condition came into force on 28 December 2018 to allow neighbourhood plans and orders to undertake a full 'appropriate assessment' to demonstrate how impacts will be mitigated. In March 2026, new basic conditions for neighbourhood plans came into force, one of which requires that a plan will need to comply with all relevant environmental outcome report requirements once these are introduced.

Site Selection

Part 1 of this toolkit explains the site assessment process, whereby all sites that have been identified as potential locations for development are assessed to decide which, if any, are appropriate to allocate in a neighbourhood plan for a particular type of development, e.g. housing, employment or community facilities.

The site assessment method allows a neighbourhood planning group to shortlist sites it has demonstrated are suitable, available and achievable for the use proposed, and which meet both its housing requirement (if this applies) and the vision and draft objectives of the plan.

Once the group has a shortlist of sites, the next step is to select the preferred site or sites for allocation. This should be done as part of a consultation exercise with the local community, landowners/site promoters and the LPA.

Consulting on site options

It is important that the preferred site allocation(s) reflects the community's shared ambition and that everyone has had a chance to have their say.

To garner as much opinion as possible on where new development is built and what the scale and design is, a public meeting, open day or exhibition is an appropriate method, however you may also consider additional consultation methods to reach a wider audience and allow people to respond by a method of their choice, e.g. postal or website surveys.

The consultation material should clearly set out and show on maps all identified sites (the longlist), the preferred options (the shortlist), and the assessment outputs which led from the longlist to the shortlist. It could then show the opportunities and constraints for each of the options and ask for preferences, ideally capturing reasons behind the preferred option(s). The material should be visually clear, as simple as

possible and avoid jargon. Capturing preferences can be done through questions, sticky notes on preferred options, feedback forms and comment boxes.

Copyright for maps, including Ordnance Survey (OS) based maps should be displayed. See the section on Writing site allocations policies for the neighbourhood plan in Part 2 of this toolkit for more information on obtaining OS mapping.

There may be choices to make between different options, e.g. allocating one large site or several small sites to meet housing need. The choice should be guided by local plan policies which your LPA can advise on and should also be tested against the vision and objectives of the neighbourhood plan.

Once the preferred options have been produced, they can be consulted on with the wider neighbourhood plan group. The preferred site(s) may also be tested against alternatives as part of the SEA.

It is essential that you have clear supporting evidence to justify the choice of sites and effective recording of the consultation efforts and responses received.

Some stakeholders will leave their objections to the formal Regulation 14 or Regulation 16 stage. If it is the former you will be able to respond to these. If it is at the latter, these comments will go straight to the external examiner so it is better to engage with the community before this stage.

You can find some [general community consultation guidance and best practice in our consultation toolkit](#).

Landowner engagement

Landowners, developers and site promoters should be engaged at the early stages of the site allocation process. This would include asking them to identify potential sites for development (as part of a Call for Sites) and establish which sites are available, to identify any constraints to development, and to identify how much development is likely to be proposed on each site and to work constructively to achieve the development objectives of the plan.

Results of the site assessment and the preferred options should also be shared to allow representations to be made and can highlight any issues such as viability and help to establish the timescales for delivery of development. It may also uncover additional sites that had not been identified in the Call for Sites process which should be considered, if possible.

Local Planning Authority

The LPA has a statutory duty to support and constructively engage with the community throughout the neighbourhood plan process. Site assessments, preferred options and proposed allocations should all be discussed with the LPA. It is crucial that the LPA supports the policies in the draft plan as they must decide if the plan meets the required basic conditions and, once the plan is made, will be responsible for implementing the policies.

The results should also be discussed with the LPA as well as the supporting evidence to ensure that the emerging preferred sites are aligned as much as possible with the other documents that make up the development framework for the neighbourhood area, including the adopted local plan and any emerging policies.

Following the steps above should result in one or more sites being identified as the most appropriate option to allocate in the neighbourhood plan to meet the identified development need, e.g. for housing or community use. This will form the basis of the site allocation policies that should be presented in the draft plan. The way these policies can be presented is covered in Part 2.

Part 2: Site Allocations

Introduction

A neighbourhood plan has the opportunity to influence where development takes place and where it is restricted. This means indicating locations or sites within a neighbourhood area where future development is supported by the community. This can include housing, retail, employment, community use, or mixed use.

The neighbourhood plan can also identify and designate green spaces valued by the community as local green spaces for protection from inappropriate development. These allocations and designations must be supported by evidence that they are necessary and that they are the right locations having considered all options.

This section sets out how site allocations should be presented in a neighbourhood plan. It also provides examples of what different types of site allocations might look like.

Site allocations

Allocations are sites clearly outlined with a site boundary on an OS map with an accompanying site allocation policy in the plan setting out, as a minimum, the proposed land use and the quantum of development appropriate for the site (as set out in paragraph 98 of the [Neighbourhood Planning section of the PPG](#)).

Additional information to add could include preferred access arrangements or on-site mitigation measures to overcome constraints identified during the site assessment stage, for example flood protection measures or landscaping, open space, biodiversity or conservation measures. It can also include design parameters or design principles that the community wishes to establish. This can be linked to a neighbourhood plan design guide, design code¹³ or masterplan¹⁴.

The purpose of a site allocation for both landowner/ developer and community

A site allocation can be used to shape development in a neighbourhood area and is also an important tool to communicate expectations and aspirations.

For a community, it can be a way of understanding and expressing the shared vision and objectives of the residents and businesses living and working in a neighbourhood area. It can be a way of communicating the levels of development and supporting infrastructure that would be accepted in an area and the design principles that should be followed.

For a landowner or developer, it provides certainty over what is expected from development, including the design and community facilities that are sought through new development.

Writing site allocation policies for the neighbourhood plan

The way site allocations are presented in a neighbourhood plan depends on the style of the plan and the complexity of the allocations. For a basic site allocation, the proposed land use and quantum of development allocated is sufficient. For a more

¹³ A set of illustrated design requirements that provide specific, detailed parameters for the physical development of a site or area. The graphic and written components of the code should build upon a design vision, such as a masterplan or other design and development framework for a site or area.

¹⁴ A planning brief outlining the preferred use of land and the overall approach to the layout of a development; provides detailed guidance for subsequent planning applications.

complex allocation a site-specific development or design brief¹⁵ can be included to supplement the policies.

What should a site allocation policy include?

Site allocation policies can include design principles, which may be informed by constraints and opportunities identified at the site assessment stage, depending on how much influence the community wishes to have on the development that comes forward on the site.

As a general rule the principle should be detailed enough to ensure the development that comes forward is in line with community aspirations but not so onerous that delivery of the site becomes unviable for a development. Examples of different types of design principles would be:

- Basic – site boundary, quantum of development and proposed land use,
- Medium – the above plus access arrangements, development area, any landscape requirements,
- Detailed - the above plus principal vehicular route, building frontage, public open space, building heights, materials. This can be presented as a site-specific design or development brief.

As set out above, a site allocation policy must include the site boundary, the proposed land use and the quantum of development appropriate for the site. Any other detail is at the neighbourhood planning group's discretion but should be informed by evidence (including evidence that its inclusion would not make the site financially unviable).

Site allocation policies should be clearly written, concise and unambiguous. They should also be site-specific rather than generic. They should be positively worded (for example "Development will be supported where it meets the following principles...") and should not promote less development than set out in the local plan or undermine its strategic policies. More details can be found in our [Writing planning policies toolkit](#).

Using Ordnance Survey mapping for site allocations

The site allocation(s) will need to be shown on an OS map to define the site boundary. Site allocations and policies will form part of the development plan for the local authority area, so clear and accurate mapping is necessary for the submission neighbourhood plan.

¹⁵ Guidance on how a site or area should be developed in terms of uses, design, linkages, conservation, etc.

An appropriate base map scale to use would usually be 1:5,000 or 1:10,000.

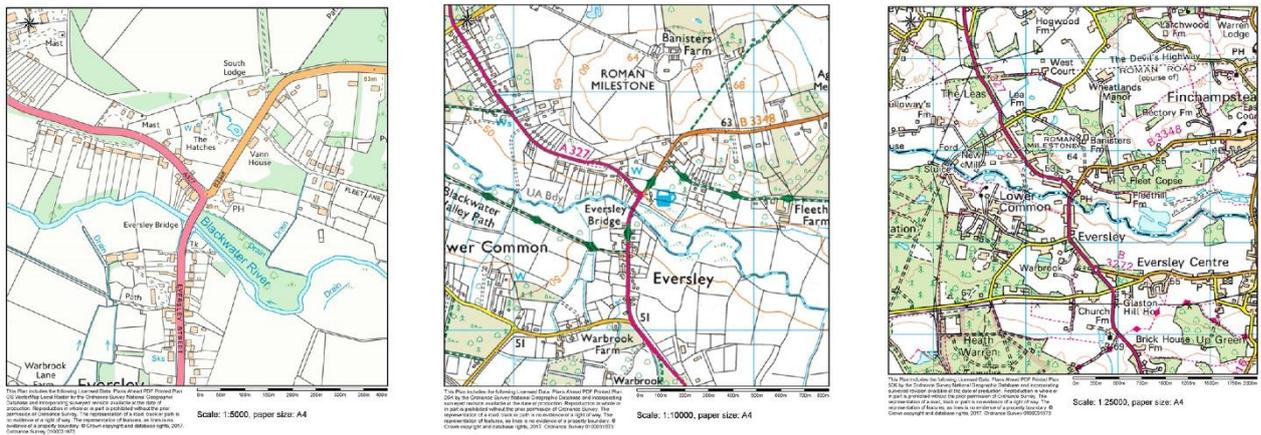


Figure 2: Examples of Ordnance Survey maps at difference scales: 1:5,000, 1:10,000 and 1:25,000 (source: emapsite)

There are a number of ways to approach the mapping of site allocations and it should be discussed in the first instance with the LPA. Some LPAs will assist with preparing maps. If the LPA produces the mapping on behalf of a neighbourhood planning group then it should comply with licensing terms and conditions under the [Public Sector Mapping Agreement](#). Parish Councils can also apply to join the Public Sector Mapping Agreement to get the premium OS data too.

There are a number of publicly available mapping data sources that can be used to source OS base maps, including [emapsite](#) and [QGIS](#) free open source GIS software and also [OS Open Data](#).

This means anyone can create high quality maps providing the licensing terms and conditions are followed.

Once the base map has been obtained, a basic site boundary can be drawn on using software such as Adobe photoshop or Adobe Illustrator. For more detailed drawings to accompany the allocation policy, to include design features or development areas, it may be necessary to employ a professional urban designer or architect to produce the drawings. Examples of different types of site allocation illustrations are shown below.

Design

The site allocation policy is an opportunity to set out the expected site-specific design principles new development should have regard to, to encourage development that respects and enhances the local character and setting. This can include:

- Development density¹⁶,
- Development layout on the site,
- The form, scale, massing and heights of buildings,
- Enclosure and definition of streets and spaces,
- Movement networks for vehicles and pedestrians (permeability and connectivity),
- The location and use of key spaces and the public realm.

For more information on design, have a look at the design toolkit.

How much development should be allocated on each site?

A site allocation should include the amount of development that would be permitted within the site boundary, as well as any areas that should be protected from development e.g. due to flood risk or for landscaping.

There are a number of ways to establish the development potential for a site. In some cases, landowners or site promoters will already have carried out a design exercise such as a masterplan or design brief.

These can be reviewed and the figures from the design work can be used in the allocation, following consultation with the LPA and community, if the neighbourhood planning group is in agreement. Local plan evidence reports, such as a HELAA or HLAA can also be checked to see if the site is included, and what capacity estimate has been applied. Planning applications and decisions can also be used to inform the development capacity.

In the absence of any existing design work or other capacity estimates, the following approach can be used to establish an appropriate density:

- Exclude any parts of the site that are not developable e.g. areas in Flood Zones 2 or 3, areas with an environmental designation or mature trees.
- Reduce the site area by the proportion shown below, depending on the size of the site. This allows land to be set aside for supporting infrastructure such as play areas and open space. The amount of non-development space needed is higher for larger sites than smaller sites as the infrastructure requirements will increase.
- Once the reduced site area (known as the net developable area) has been established, apply an appropriate development density to the site. The LPA

¹⁶ In the case of residential development, a measurement of either the number of habitable rooms per hectare or the number of dwellings per hectare.

should be able to advise on appropriate development densities at different locations. It may also be set out in the local plan, or the HELAA or HLAA. Alternatively, recently permitted developments can be used as a benchmark to compare or a design exercise or design brief can be prepared to establish how much development would be appropriate at this location and can be used to illustrate the policy in the neighbourhood plan.

Site size	Net developable Area
Up to 0.4 ha	90%
0.4 ha to 2 ha	80%
2 ha to 10 ha	75%
Over 10 ha	50%

Calculated capacities are likely to be indicative only and more detailed design work would allow consideration of site specific opportunities and constraints (meaning that the eventual site capacity may increase or decrease).

Phasing of development

Once the location of development and site capacity has been established, consideration should be given to the timescales for delivery of development. This will help to ensure that development takes place in accordance with the plan's strategy and that there will be a continuity of housing supply. To achieve this, the plan period (usually 15 years) can be divided into phases of 5-year time bands, e.g. 0-5, 6-10, 11-15 years.

The phase that a site is placed in will depend on the size of the site, whether there is a developer already engaged in the process and whether there are any constraints that would need to be resolved that may delay the construction of the development.

Minor residential sites (fewer than 10 homes) with few constraints and which have a developer on board may be phased in the 0-5 year time band. Medium sites (up to 50 homes) or sites with constraints that would need to be mitigated or resolved before development, such as flood risk or access limitations, could be placed in the 6-10 year phase. Sites which have significant constraints, for example that are dependent on infrastructure provision such as a new road, may be phased in the later timescale.

Very large sites could be spread across two or more of the time bands. Major residential development of over 50 homes, will require more detailed infrastructure and environmental assessments.

The plan objectives may be to prioritise brownfield¹⁷ allocations over greenfield¹⁸ sites in order to make the best use of land. Therefore, these sites should be phased as early as possible. Any brownfield allocations where little developer interest is evident, or with unresolved constraints may however have to be put back to phase 2.

Sites can also be allocated as 'reserve' or contingency sites, which would only come forward if allocated sites prove to be undeliverable due to unforeseen constraints.

Testing your site allocation policies

Once preferred sites have been selected, it is helpful to ask the following questions to test that the most appropriate sites have been chosen, that this can be justified, and that the selected sites can meet the identified development need, e.g. a housing requirement:

- How can you demonstrate the site(s) are suitable?
- How can you demonstrate site(s) are available?
- How can you demonstrate site(s) are achievable (i.e. economically viable)?
- Is it clear how the site(s) have been selected as the best option over alternatives?
- Are the proposals aligned with the adopted local plan and do they have regard to any emerging or draft local plan documents, including the local plan evidence base?

¹⁷ Brownfield land is land that has been previously developed. Land which is or was occupied by a permanent structure, including the curtilage of the developed land (although it should not be assumed that the whole of the curtilage should be developed) and any associated fixed surface infrastructure. This excludes: land that is or was last occupied by agricultural or forestry buildings; land that has been developed for minerals extraction or waste disposal by landfill, where provision for restoration has been made through development management procedures; land in built-up areas such as residential gardens, parks, recreation grounds and allotments; and land that was previously developed but where the remains of the permanent structure or fixed surface structure have blended into the landscape.

¹⁸ Land where there has been no previous development.

Examples of site allocations

The figures below show examples of different types of site allocation that would be appropriate for a neighbourhood plan.¹⁹ The most basic site allocation would need to show the extent of the site boundary in relation to the existing settlement. It is not necessary to go beyond this level of detail, but you can also include high level design principles that are encouraged in development proposals for the site.



Example of a basic policy:

Policy NP01 – Land south of Church Road

Proposals for 24 dwellings at Land south of Church Road, as identified above, will be supported.

Example of a policy with a medium level of detail: Policy NP01 – Land south of Church Road

Proposals for 24 dwellings at Land south of Church Road, as identified above, will be supported.

Development proposals must incorporate the following principles:

- Built form is to be contained within a 1 Ha area within the site close to the existing dwellings;
- The remainder of the site will be a landscape buffer helping to define the new settlement edge; and
- The vehicular access will be taken from Church Road.

¹⁹ These are intended to be examples only, and do not represent actual policies.

Example of more detailed policy:

Policy NP01 – Land south of Church Road

Proposals for 24 dwellings at Land south of Church Road, as identified above, will be supported. Development proposals must incorporate the following principles:

- Built form is to be contained within a 1 Ha area within the site close to the existing dwellings;
- Public open space will be integrated to the scheme and will be located in a location that encourages use by the existing community;
- Landscape buffers, helping to define the new settlement edge, will be located along the western and southern site boundaries; and
- The vehicular access will be taken from Church Road;
- Dwellings adjacent to Church Road will be road fronting;
- Dwellings will be a range of single and two-storey dwellings; and
- Development should respond to and enhance the distinctive local character including consideration of materials, layout and form.

Figure 3: Examples of a site allocation policy with different levels of detail.

The policy can also include more detail in the site plan, to illustrate the design principles that would be supported in development proposals. Figure 4-6 show a range of examples of plans showing high-level design principles.



Figure 4: Basic site allocation plan

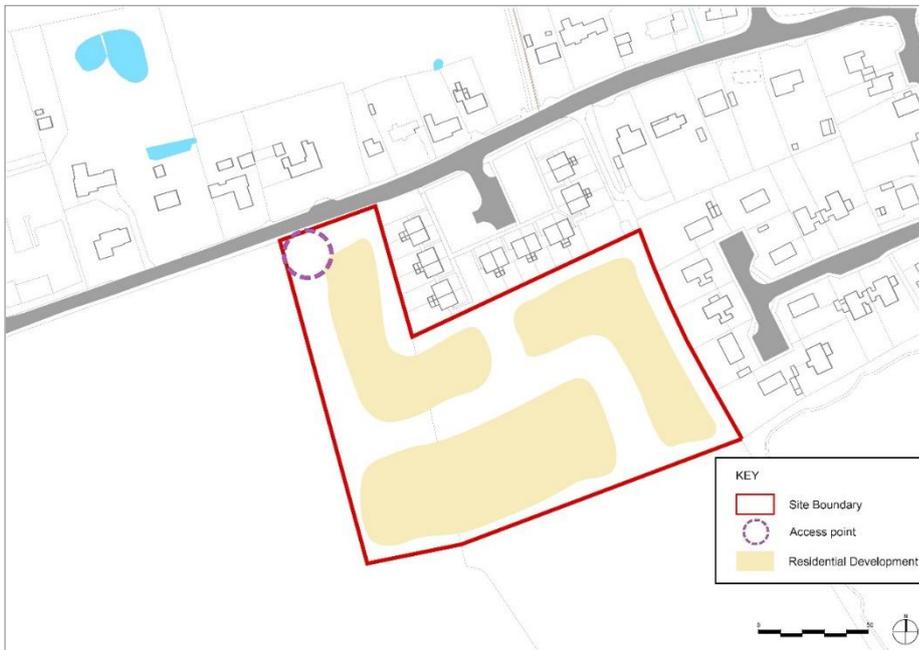


Figure 5: Site allocation plan with some design principles



Figure 6: Site allocation plan with more detailed design principles

What can the neighbourhood planning group do to support the delivery of site allocation policies and monitor progress on sites?

Once a neighbourhood plan is 'made' it becomes a statutory document and part of the local development plan and is used to determine planning applications. The policies of the neighbourhood plan are implemented by the LPA but the neighbourhood planning group can play a positive role in supporting and monitoring the plan and the allocated sites.

The group should play an active role in monitoring the allocations. This could include monitoring the planning applications in the neighbourhood area and making representations on planning applications to explain how the proposed development aligns or conflicts with the neighbourhood plan policies.

The representations may include objections or supportive comments or suggested improvements to help deliver neighbourhood plan objectives. Planning decisions and legislation should also be monitored and where there are implications for the made plan, these should be noted so that modifications to the plan can take these into account.

The phasing of sites should be used to monitor the delivery of the site allocations. In the event of shortfalls or an excess of land supply over time, the plan can be amended.

Other ways of delivering development through a neighbourhood plan – Community-led development

Community-led development is a means of taking control of the design, consenting, construction and then subsequent management of development. It can enable more creative approaches and ensure the actual delivery of the neighbourhood plan's aims, policies and allocations.

There are a number of mechanisms to deliver site allocations and secure planning permission which are outlined below.

Different models of community-led housing include co-housing, cooperative and tenant controlled housing, community land trusts and projects run by community organisations. Community-led housing could also be a means to enabling and delivering self-build or custom build housing.

Neighbourhood Development Orders

Neighbourhood Development Orders (NDOs) can be used to approve planning permission for certain kinds of development. They can grant outline planning permission for sites identified or allocated in a neighbourhood plan. Some flexibility is retained as a detailed planning application would still be required before development could go ahead.

If you have detailed proposals for a site, then you may wish to consider using an NDO. NDOs grant planning permission for specific development in a particular area, such as housing, commercial uses or recreational uses. It can also be used to allow alterations such as change of use, across a wider area such as a town centre or a neighbourhood

area. Such permissions could be subject to development or design guidelines to ensure the development aligns with the objectives and policies of the neighbourhood plan.

This can be carried out as part of, or parallel to, a neighbourhood plan. With all site specific proposals, it will be important to speak with the landowner to ensure the proposals are deliverable.

Community Right to Build Orders

A Community Right to Build Order (CRtBO) is one kind of NDO which can grant planning permission for small-scale community-led developments. These could include things like housing, community centres, business and enterprise hubs or community energy schemes. The benefits of using a CRtBO are any proceeds can only be used for the benefit of the wider community and gives more certainty for both the developer and the community that it will happen.

CRtBOs can be used to approve planning permission for small-scale community development. CRtBOs grant planning permission for a detailed scheme, so there needs to be a high degree of certainty over the form of development to make use of a CRtBO, as the scope for later modification is limited. The level of information required for a CRtBO is often similar to that needed for conventional planning applications.

CRtBOs can be prepared in parallel with a neighbourhood plan.

MHCLG has a number of toolkits about delivering community-led development. These can be found on the GOV.UK website.

Other things to consider

Once the preferred sites have been consulted on and the sites for allocation selected, you will need to think about how to present them in your plan and what information to include.

Additional things to consider include:

- Whether the sites are subject to provision of affordable housing, open space and contributions from Community Infrastructure Levy (CIL) and what benefits that could bring the community.
- Whether any of the sites could be delivered directly through the community, through a Community Right to Build Order. A proposal for Community Right to Build Order can be developed alongside a neighbourhood plan or on its own.
- Whether all or part of a site would be suitable for self-build or custom build housing, co-housing or other community-led housing provision.

Final checklist

Question	Yes/No
Have a reasonable number of people been involved in site assessments and have they declared any relevant interests from the outset? Have the same people been involved in assessing all sites?	
Have sites within the local planning authority Housing and Economic Land Availability Assessment (HELAA) been included in the assessment? Have current planning applications been included? Has the location of local plan allocations and sites with planning permission been identified?	
Have the preferred sites been assessed to ensure they are suitable, available and achievable i.e. viable?	
If adding your own local criteria to the site assessment, are they fair? Avoid criteria that will only discriminate against one site. Has the same criteria and rating method been used for each site?	
Have you clearly 'told the story' in terms of why sites have been rejected, shortlisted or become preferred sites?	
Have you clearly documented every assessment meeting and, in particular, short-listing meeting(s) and preferred sites meeting(s)? Identify how this was done from minutes etc.	
Have you integrated a Strategic Environmental Assessment (SEA) into your site selection process, if required?	
Is the proposed amount of development, e.g. number of new homes, appropriate for the site? Density of development should be consistent with the adopted or emerging local plan policies.	
Has the site selection process and its conclusions been properly communicated to local people, site owners, promoters and other stakeholders?	
Have the reasons for the preferred sites been properly and effectively explained? This may be presented on the website, at exhibitions and through newsletters.	

