

Establishing a steering group

1. Introduction

- 1.1. Within West Berkshire, only parish and town councils can instigate a neighbourhood plan. Parish/Town Councils should enlist the help and assistance of volunteers from the local community via a steering group to undertake the day to day tasks.
- 1.2. It is important to remember, that the parish/town council still has responsibility for the plan and all the final decisions made.

2. Why you need a steering group?

- 2.1. Due to the work involved in producing your neighbourhood plan, you will require additional people to those who are on the existing parish council. The establishment of a steering group will allow you to delegate the day to day tasks of organising consultation events, information gathering, editing drafts and producing the final plan to others, whilst the parish council concentrates on other wide ranging existing parish matters.
- 2.2. A steering group may have various different names including; steering committee or management committee. Whatever name you choose to use, the group should be able to:
 - Consider the overall aims of the neighbourhood plan;
 - Set a project plan and monitor activities against the timetable outlined.
 - Link the aims and objectives of your plan in a wider context.
- 2.3. A successful steering group meeting should question, provide ideas and have a useful distance and perspective to assist working on the details of your neighbourhood plan.

3. What is the main role of a steering group?

- 3.1. As the parish/town council remains the responsible body for the neighbourhood plan, the steering group must report to the parish/town council on a regular basis and receive ongoing endorsement, via parish council minutes, during production of the neighbourhood plan.
- 3.2. The steering group will need to develop a project plan and consultation plan for the production of the neighbourhood plan within the budget set by the parish council.
- 3.3. The parish/town council are accountable for the expenditure and ensuring that the project budget remains on track. Therefore, the steering group needs to keep the parish council informed of any changes in timetable or budget requirements.
- 3.4. The steering group will be responsible for ensuring links between the parish/town council, the community and professionals involved are maintained and everyone has the opportunity to be engaged within the project.
- 3.5. In addition, the steering group is not just limited to the tasks already detailed; there are many other possible tasks that they could also undertake, such as:

- Acting as a focal point for people living or working in the Neighbourhood Area.
- Providing a forum for discussion and debate.
- Helping to see more effective ways of getting things done.
- Motivating the community to be involved throughout the plan.
- Troubleshooting any conflicts raised.
- Assisting the parish/town council to meet the terms of the service level agreement.
- Assisting the plan to achieve a high profile within the local area and wider community.
- Maintaining the energy and enthusiasm to ensure that whatever needs to be done, will be accomplished.
- Setting up sub-groups to focus on particular themes that arise through the consultation process.
- Identifying ways of involving the whole community and gather the views and opinions of as many individuals, groups and organisations in the community as possible.
- Determining the types of survey and information gathering to be used.
- Co-ordinating the collation and analysis of the consultation feedback in accordance with the General Data Protection Regulations.
- Obtaining advice and information about relevant matters and policies.
- Prioritising actions, using the findings from the consultation process and information from other sources.
- Establishing the necessary skills required to complete the neighbourhood plan.
- Undertaking and producing the additional material such as consultation reports and environmental assessments.
- Reporting back to and receiving endorsement from the parish council on progress, issues arising and outcomes throughout the process.

4. How to set up your steering group?

- 4.1. The steering groups should be representative of the neighbourhood area. For example, if your neighbourhood area covers more than one parish, then this should be reflected in the membership of the group.
- 4.2. The steering group should include both parish/town councillors and members of the community. There is no required size for a group but smaller groups can sometimes lack the breadth of experience or resources required whilst larger ones can lose focus.
- 4.3. Deciding on the skills and experience required within the group would be a good starting point. Remember that enthusiasm and drive is just as important as an identified skill such as planning experience or project management.
- 4.4. When forming the steering group for your neighbourhood plan try to get a diverse range of skills involved, therefore avoiding people with similar skills or backgrounds and try to incorporate members from all of your community.
- 4.5. It is a good idea for everyone on your steering group to have clearly defined roles, which will also enable the group to make the best use of resources, for example, a people person would be good at getting community support and organising consultation events, yet a financial whizz would be good at keeping a control on the budget plan.

- 4.6. Try and develop a clear project plan early in the process, outline a working budget, set aims and objectives, and set guide timescales. It is important to keep up regular meetings throughout the development of your plan, this will not only keep everyone abreast on the progress of the plan but will also help to maintain enthusiasm at all times.
- 4.7. You may like to involve your Ward Member in helping you develop the steering group.

5. How does the steering group relate to the parish/town council?

- 5.1. Activities undertaken by the steering group should be transparent and communications links with the full parish council strong as they will remain the responsible body.
- 5.2. The steering group should report to and receive endorsement from the parish council on a regular basis.
- 5.3. Below is a checklist of things it is important to remember about the relationship between your parish council and your steering group.
 - Throughout the development and implementation period of the neighbourhood plan there needs to be a standing Neighbourhood Planning item on the parish/town council agenda.
 - There should be minutes of parish council decisions in relation to the steering group and neighbourhood plan.
 - The steering group may identify a need for funded expertise from other bodies and make recommendations to the parish council. The parish/town council will then seek a minimum of three quotes and commission the work.
 - Budget responsibility lies with the parish council and not the steering group.
 - It is recommended that the steering group gives a presentation to the parish via a parish meeting, at key stages of the neighbourhood plan process.
 - The steering group present the neighbourhood plan to the parish/town council who will ultimately sign the document off.
 - Parish/town council will submit the neighbourhood plan to West Berkshire Council.
 - Members of the parish council can be in the steering group.
 - Conflict within the steering group should be referred to the parish/town council.
 - Terms of Reference used by the steering group will have been agreed by the parish/town council.
 - Utilising someone as a 'bridging co-ordinator', who essentially oversees the communication between the steering group and the parish council.

6. How to facilitate steering group success

- 6.1. To help ensure a successful steering group the members should:
 - Take an active part in the meeting (not just sit there).
 - Make positive proposals (when ideas are needed).
 - Ask questions (if information is needed).
 - Offer alternatives (to create agreement).

- Build on proposals (to cement group vision).
- Test ideas (not reject them out of hand).
- Explain opposition (not just fl at rejection).
- Help others (to cement solidarity). There is no set of rules needed, however, it is ideal that for the steering group meetings there needs to be:
 - A 'Terms of Reference' developed that are approved by the parish/town council. Locality have published guidance on how to produce a Terms of Reference: <https://neighbourhoodplanning.org/toolkits-and-guidance/write-terms-reference-neighbourhood-plans/>.
 - A chair or facilitator, through which all discussion is handled.
 - An agenda, which discussion should follow.
 - Someone to take notes, to be circulated later.
 - Everyone should be clear at the end of each meeting what the recommendations to be taken forward, or work to be done prior, to the next meeting are.
- Ensure that discussions are for the benefit of the whole community.

7. Finance considerations of your neighbourhood plan

- 7.1. The financial implications of your neighbourhood plan will be a key priority throughout the process. However there are some considerations the steering group will need to be aware of.
- 7.2. The steering group cannot make any financial decisions on behalf of the parish/town council. However, the parish/town council can delegate authority to the clerk, (usually in consultation with the chairman and vice-chairman) to approve payments up to a certain amount. This must be clearly minuted.

Points include:

- A budget will be agreed by the parish/town council.
- Large items of expenditure should be placed on the parish council agenda for approval. The threshold of which is to be decided by each individual parish/town council and written into their Terms of Reference.
- Invoices should be made out to the parish/town council (to enable VAT reclaim) and should be paid in accordance with the parish/town council's financial regulations. The accounts relating to the neighbourhood plan process will be audited and open to the public.
- Substantial decisions, such as contracting a planning consultant, must be approved by the parish council. The parish/town council will also need to approve the terms and conditions of the contract.
- Any commissioning of funded expertise from other bodies must be undertaken by the parish council.
- Insurance - steering groups of the parish council are usually covered under the parish council's insurance, however the clerk should check the details with their insurer.

8. Terms of Reference

- 8.1. Producing a simple 'Terms of Reference' for the group would be helpful. This should set out the purpose and remit of the group and the reporting and decision making procedures.

- 8.2. Terms of Reference for the steering group should be approved by a meeting of the parish/town council.
- 8.3. Terms of reference should ensure that the parish council receives regular written reports from the steering group. Draft sections should be endorsed by the parish/town council to ensure the council is fully on-board with the plan before it reaches completion. The steering group is responsible for liaising with both West Berkshire Council and the parish council.
- 8.4. Localities have produced guidance on writing a terms of reference:
<https://neighbourhoodplanning.org/toolkits-and-guidance/write-terms-reference-neighbourhood-plans/>.