



## Checklist process: eight steps to creating open space

The checklist process is a step-by-step set of recommendations which will take you through all the processes involved in establishing an open space project on previously developed land (PDL).

The eight steps involved in the process can be used to help with the creation of a permanent open space on a previously developed site.

Each part of the process has important recommendations, considerations and objectives to take into account, some of which are laid out in the checklist below.

## Step 1: The site and early vision

The first step in a project is to identify a site, come up with an idea for open space provision and consider how to approach establishing an open space project. The following critical factors are recommended as the first elements to consider.

Site location	
Other open spaces	
Site boundaries	
Site size	
Ownership (current and historical)	
Ordnance Survey Map	
Potential partners and future stakeholders	
Is planning permission required?	
Potential funding opportunities	
Knowledge and skills gaps	

## Step 2: Project partnership

For any project, it will be essential to have an established group responsible for developing a project and taking it forward. Once potential partners have been identified and an understanding of potential funding sources has been established, the following tasks are recommended

Co-ordinate discussions with potential partners	
Agree organisational structure	
Initiate engagement with potential project partners	
Agree a way forward with the early makings of a project vision	
Identified a project lead	

### Step 3: Baseline information gathering

To develop any project and to ensure that added value can be achieved, it will be essential to have a full understanding of the site context. Understanding the context helps to reduce the risk of coming across unforeseen problems mid-way through a project, such as contamination risks or ground instability and may also help to identify opportunities that will support a project

Contamination levels/site categorisation	
Soil resource and constraints	
Landscape character and value	
Landscape context	
Is the site, or could it be, linked to a wider ecological network or green and blue infrastructure?	
Does the site have ecological value, for example is it a designated site or does it support habitats or species priorities under the UK Biodiversity Action Plan?	
What is the local population profile?	
Are there any proposals for development that may be relevant to the site? For example planning applications or longer term planning policy.	
What are the local objectives for economic development relevant to the area?	
What is the development context for the area, including proposals and policy?	
Is the site or are adjoining areas designed for any particular value?	
What are the current patterns of use on the site?	
Is anti-social behaviour an issue?	
Is the local community active in other projects and initiatives?	
Risk register and strategy established	

## Step 4: Vision and objectives

The development of a vision and of objectives is best achieved through dialogue with key interested parties. However, in the interests of efficiency, it is recommended that a reasonably small core group of representatives carry out the task rather than involving all interested parties. The following advice is provided to help with the development of a vision, however it is important to note that a vision should always be unique and there is not one simple formula for creating a vision for a site.

Have confidence that there is consensus for the type of open space development proposed	
A clear vision for the way forward	
Agreed set of project objectives	
Update risks and solutions	

## Step 5: Development and delivery

An action plan will provide the focus for how a project will evolve from a vision into real tasks and actions. The action plan will provide details about how to take objectives forward with information on tasks, responsibilities, timescales, key milestones and targets and funding sources. The following table provides an example of an action plan structure.

Objective	Task	Reason	Contact	Key milestones	Completion	Funding	Priority
<b>Objective 1</b> Open space project will promote learning opportunities about biodiversity through the use of signage and through making connections with the local primary and secondary schools	Contact the local primary school head teacher	Identify if there is an interest in developing a learning resource	Project manager	Meeting arranged  Support of school secured	Mar-11	Local Education Authority (LEA)  In kind teacher time	High
	Wildlife interpretation resource developed	Information boards as suggested by school	Project ecologist	Draft resource circulated for comment	Sep-11	LEA  RSPB	Medium
	Etc...						
<b>Objective 2</b>	Etc...						

## Step 6: Maintenance and management

Once up and running, the success of the open space project will depend on maintenance and management, particularly where revenue funding is difficult to secure in the long term. In developing a project the following needs to be considered:

Who will have overall responsibility for the post-construction management of the open space?	
How much maintenance will a project require in the long term?	
Will a project need full time or part time staff to keep it running?	
How will long term costs be secured?	
Will the project have potential to generate income to reduce or remove reliance on external/unreliable funding?	

## Step 7: Baseline information gathering

A funding strategy will enable the project team to work through what a scheme may potentially be eligible for or not, as well as what actions need to be taken, including identifying timescales for applications, finding additional match funding and identifying qualifying organisational structures.

Additional stakeholders and funders identified	
Objectives are developed with sets of tasks with responsibilities agreed with team members and project partners	
Effective project management skills are essential at this stage	
Risks are considered, identified and contingencies put in place	
Actions are identified, agreed and implemented	
A programme is put in place and milestones set to help monitor progress	
Planning application is made and permission secured	
Potential Funding sources identified	

## Step 8: Consultation

The need to engage with the communities living and working in the vicinity of a site was identified to help understand how previously developed land (PDL) sites are perceived and to draw in ideas for how to develop a sustainable project that will be valued and used. It will be important to have a reasonable level of certainty that a project will proceed before going out to wider consultation. This will ensure that stakeholders are not potentially disappointed by failure to deliver a scheme. In taking a project out to consultation the following elements should be considered:

Find out who might be interested and could make a contribution to the project vision	
Identify a suitable location for presentation of early ideas	
Advertise the consultation event widely and provide sufficient advance warning (no less than two weeks)	
Ensure that there is sufficient flexibility to allow consultation responses influence the project in a real way	
Keep a record of consultation discussions and create a statement to demonstrate how the proposal has responded	