Hello

FUTUREGOV

Digital Viability Alpha Show & Tell 4

11/11/19

What are these sessions about?

- Showing progress early and often
- Opening up discussions with people not involved in the day to day work
- Showing next steps and how people can get involved

Where we're at

Where we’re at

- Come a long way in terms of data - can bring things together in one place and standardise viability data schema
- We have proved it is feasible to build something functional with certain sources of data, we now need to prototype and test different versions to understand how case officers and viability officers might use the information and what else they need
- We are going to focus our efforts on learning and prototyping different aspects of the experience in the remaining time

Concept testing insights

Executive summary

In 2018, we worked with Southwark Council and identified 2 key areas of the planning process where viability could be most impacted by a few concepts of supportive data driven tools. We did not test the concepts and therefore this phase aims to test hypotheses and assumptions of the two concepts we came up with in order to inform prioritisation for design of the alpha prototypes.

Concepts tested

1. Viability assessment checker: developers input data and receives guidance against policy and expected figures from the council, with the ability to submit as part of their application.

2. Review and comparison tool: A way to find and select comparable sites to compare against an application and proposed site.

Link to full report

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Testing sessions

The first two sprints (2 weeks each) were used to test concepts. We tested with 17 people, a mix of case officers, viability officers, consultants and developers.

The testing sessions were face to face or remote, about 1 hour and used these tools and methods:

- Concept sketches
- Interview questions
- Data type card sorting

Results and next steps for the alpha

Our findings and insights led us to move forward with the Review and Compare tool as the first step for a prototype. Aspects of the checker tool still have potential, as we are still exploring how data might be submitted and how the checker results might also help case officers better understand viability. We also learned more about the types of data people needed to see around comparable sites.

Our next step is to further test and learn about what people need in a Comparison type tool, data needed, and process.

Testing plan

What we want to test in the remaining time

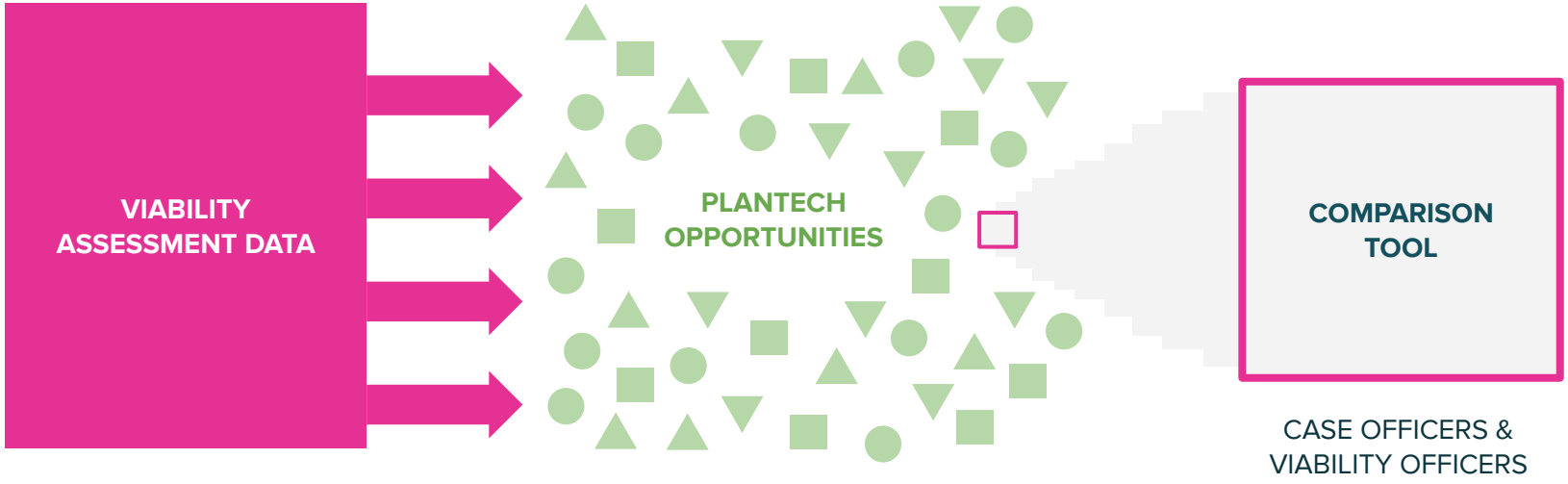
- Alpha is about testing out different approaches and getting answers to the tough questions
- Our research so far has answered some of those questions but has raised some more
- We need to answer these questions around what information do different users need, and the best ways to present it to make it useful for them, in order to know what to build out in future
- The comparison tool prototype is one manifestation of the potential value that we are trying to unlock through this work, so we will also be testing assumptions related to the capture of data and improving confidence of case officers

EXPERIMENT A USING VIABILITY DATA

We believe that
Collecting machine readable and standardised viability assessment data

Is an opportunity for
The plantech industry to create more data-driven products and services for the planning system.

We know this is true when we see
Officers using a data-driven tool to investigate applications in more detail, choose sites to compare a submission to and improve negotiations with developers.



EXPERIMENT B MAKING VIABILITY ACCESSIBLE

We believe that
Creating a compare tool to run viability assessments

Is an opportunity for
A more inclusive and diverse understanding of viability assessments

We know this is true when we see
Other members of the local planning authority able to participate in assessments and able to interrogate outputs

Understand how viability assessment will be done

DEVELOPERS
CASE OFFICERS

Understand how to find comparables

CASE OFFICERS

COMPARISON TOOL

CASE OFFICERS &
VIABILITY OFFICERS

Understand how the viability assessment has been done

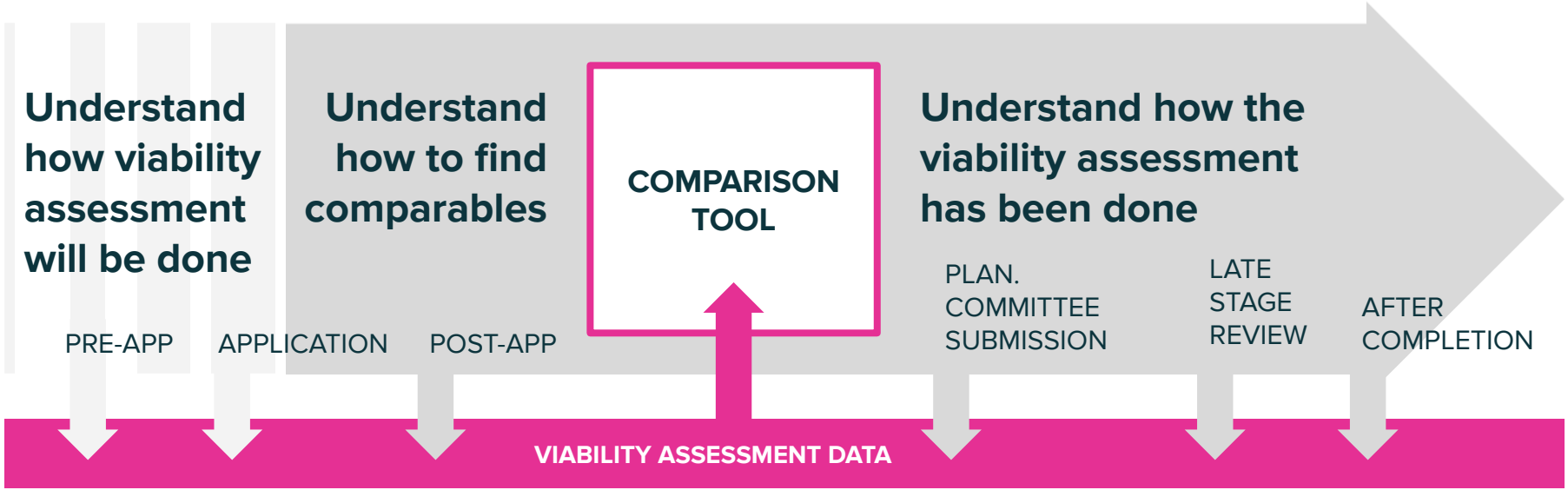
CASE OFFICERS
PLANNING COMMITTEES
PLANNING INSPECTORATE
RESIDENTS
POLICY MAKERS
DEVELOPERS

EXPERIMENT C COLLECTING NEW DATA

We believe that
Making viability accessible

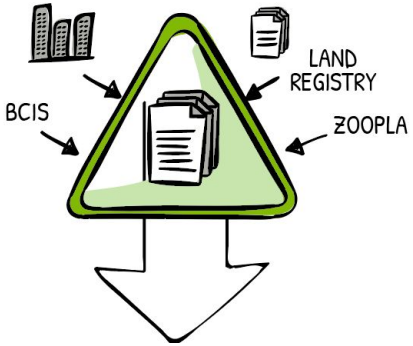
Is an opportunity for
Collecting viability assessment data in standardised and machine readable format

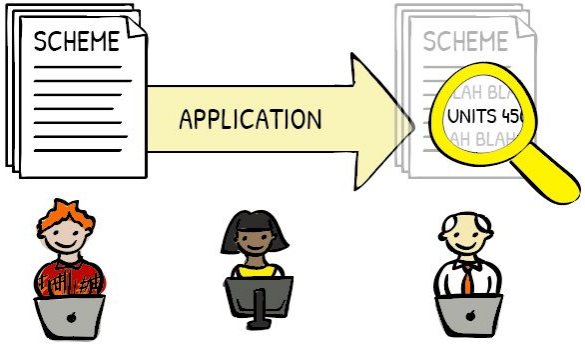
We know this is true when we see
Data being collected in a way that can inform processes



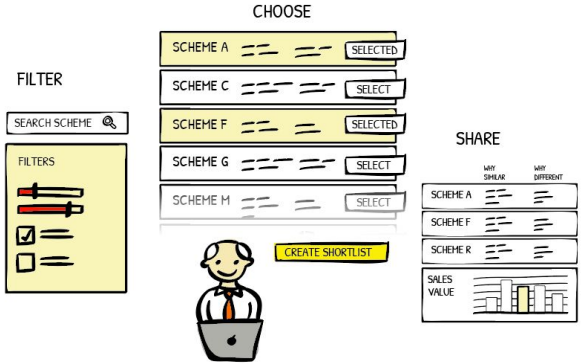
WHAT TO PROTOTYPE **EXPERIMENT A** USING VIABILITY DATA

COLLECT





UNDERSTAND



COMPARE

NEGOTIATE

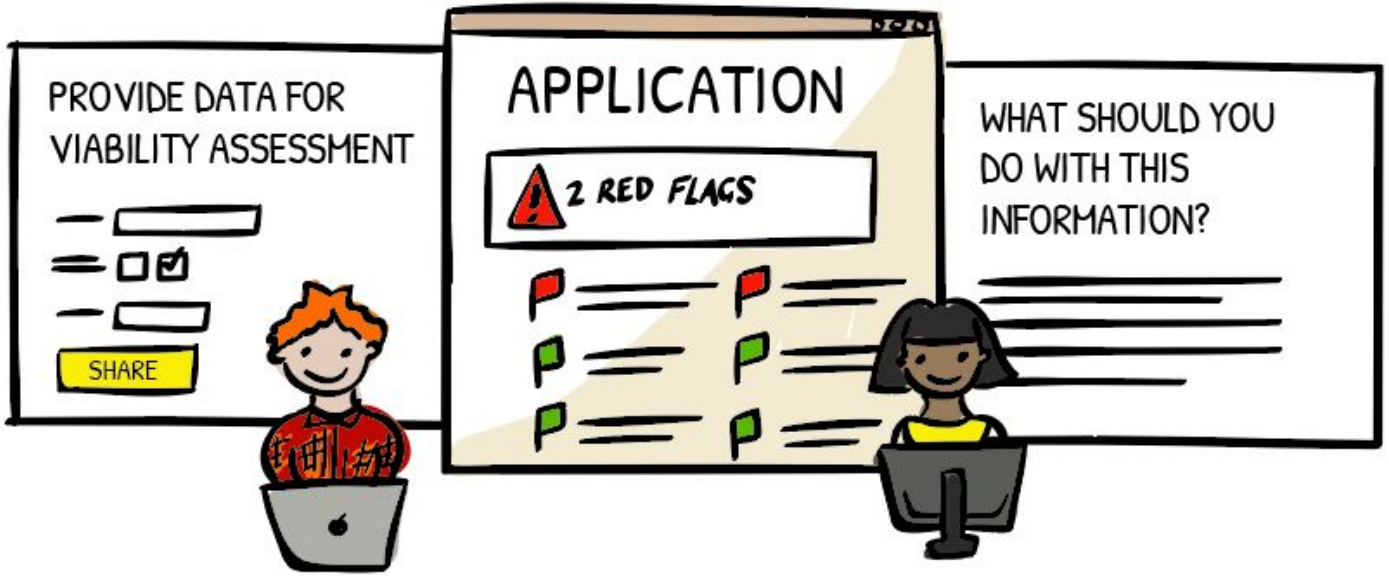
WHAT TO LEARN **EXPERIMENT A** USING VIABILITY DATA

***BOLD = priority for next 2 sprints**

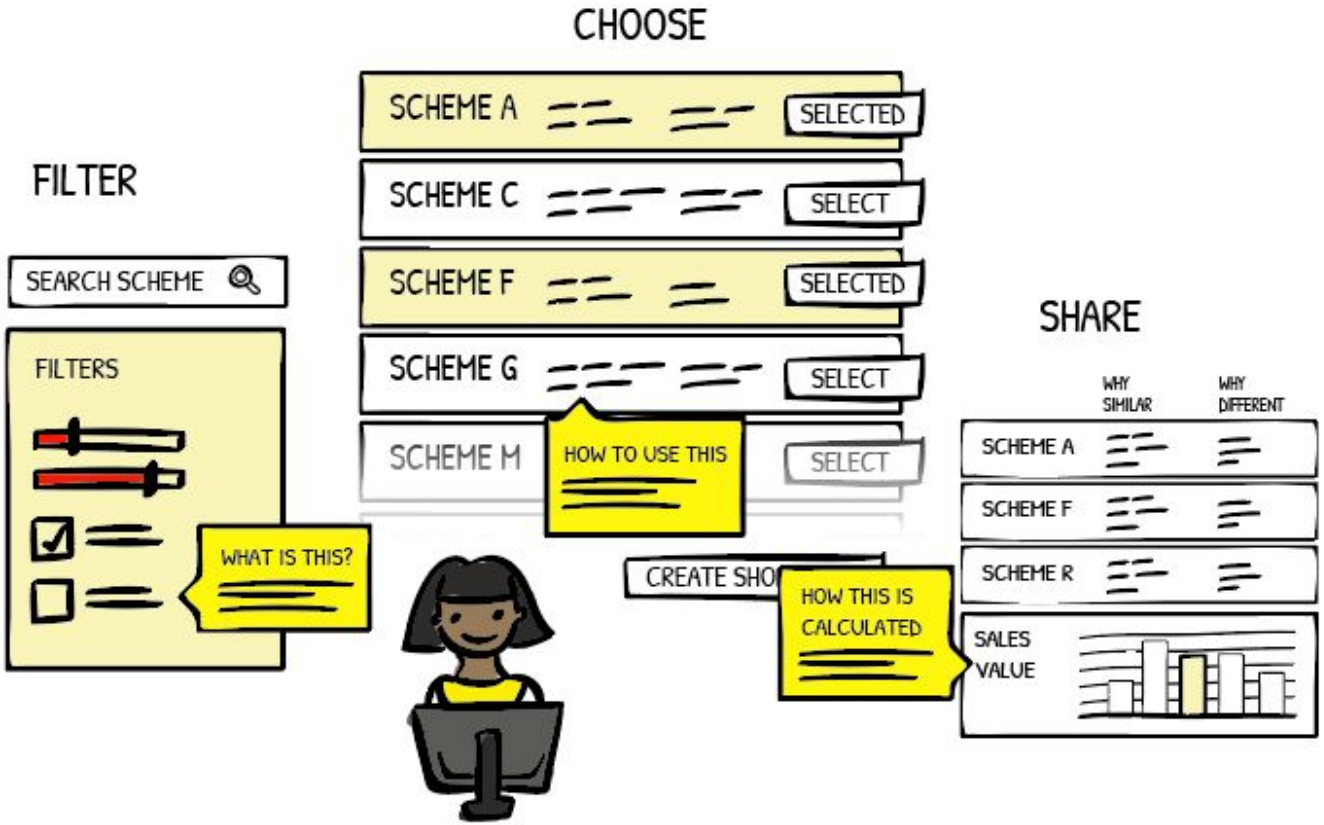
Data can be extracted from existing, historic viability assessments (ongoing)

1. **Data sources used are considered reliable**
   (Sprint 5- week 1)
2. **What data should we show to Viability Officers?** - within an application and what other data outside of it might be useful
   a. **To find similar schemes** (done in Sprint 1, 2)
   b. **To compare them** (Sprint 5 - week 1)
3. **Data can be presented to make it easy to understand and use** (Sprint 6)
4. **Viability Officers are able to use a filter to create a list of comparable sites**
   (Sprint 5 Week 2)
5. **Viability Officers will feel more confident when talking to viability consultants and developers**
   (Sprint 6, 7)
6. How many historic viability assessments are necessary to start using the tool? (Future phases)
7. **What is useful to share with whom and how?** (Sprint 6)

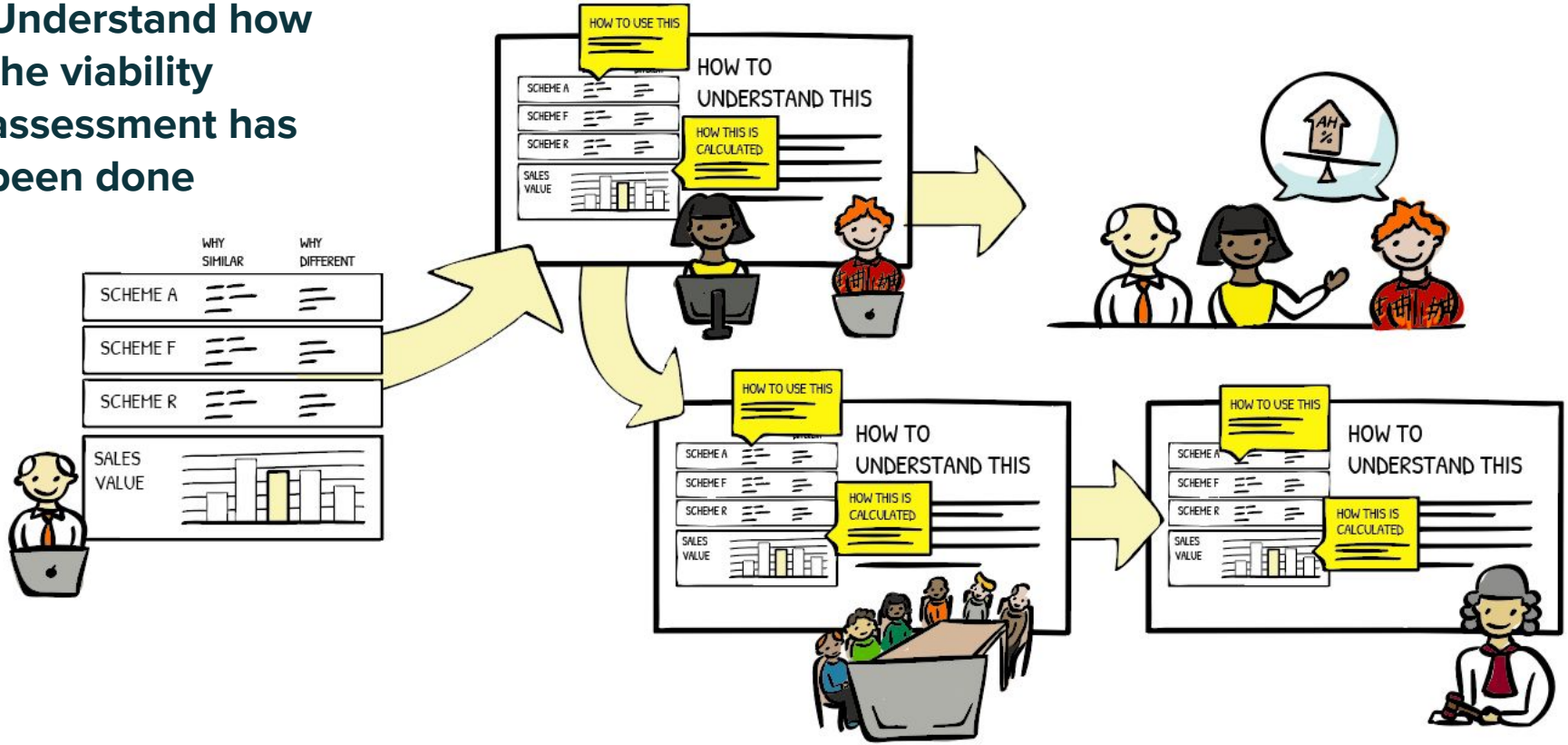
Understand how viability assessment will be done



Understand how to find comparables



Understand how the viability assessment has been done

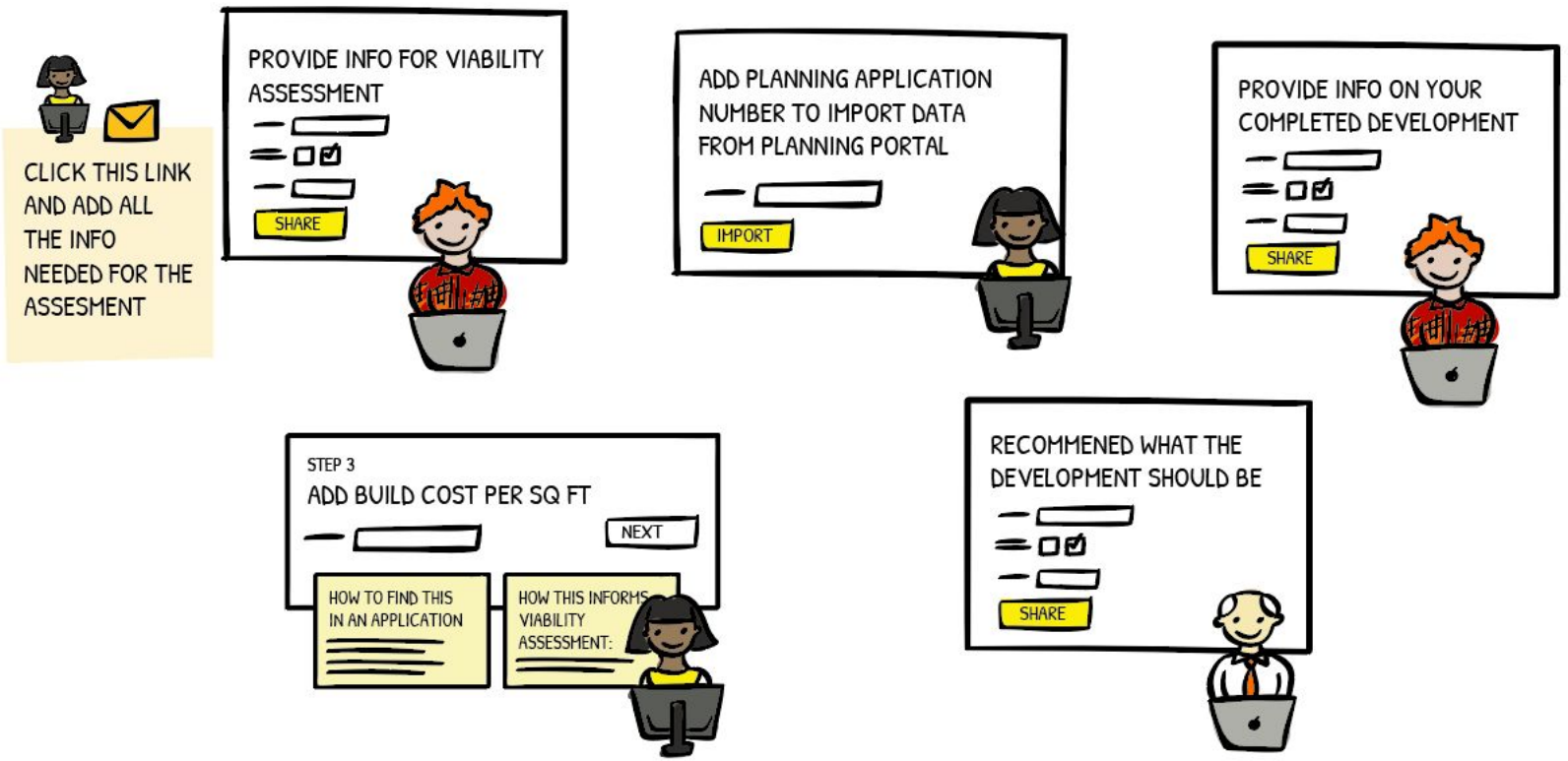


WHAT TO LEARN **EXPERIMENT B** MAKING VIABILITY ACCESSIBLE

***BOLD = priority for next 2 sprints**

1. **Case officers understand how to use the data from the application in the comparison tool**
   (Sprint 5 - week 1,2)
2. **Case officers can acquire the knowledge to use the comparison tool**
   (Sprint 5 - week 1)
3. Case officers are able to use a filter to create a list of comparable sites
   (Future phases)
4. Case officers can understand whether similar schemes could have more affordable housing
   (Sprint 7)
5. Case officers will feel more confident when talking to viability consultants and developers
   (Future phases)
6. What's exported from the comparison tool is easy to understand and use
   (Future phases)

WHAT TO PROTOTYPE **EXPERIMENT C** COLLECTING NEW DATA



WHAT TO LEARN **EXPERIMENT C** COLLECTING NEW DATA

*BOLD = priority for next 2 sprints

Prototype a submission form to be tested in different scenarios.
Create a tracker to measure its impact in the following months.

1. **It's possible to capture standardised data**
2. **People are willing to submit data**
3. **Data capture informs the process**

[App] Councils are using ways to ask developers to standardise data (Sprint 5)

[App] Planning Portal would create a form to standardise data needed (Sprint 4, more in 5-6)

Scenarios to test form (Future phases)

1. [Pre-app] Developers would submit data to inform pre-app conversations
2. [Pre-app] Case officers would submit data to understand more about viability
3. [App] A mandatory process would bring developers to submit data as requested
4. [Post-pp] Case officers would submit data to understand more about viability
5. [Plan.Comm.] Viability Officers use submit data to explain why a scheme is recommended
6. [Late Stage] Developers would submit data to inform late stage reviews
7. [Completion] Developers would submit data after completion

Data

Data Activities

- Priority has been **expanding the database** of historic viability assessments with more examples to support the prototype testing plan
  - This has involved a LOT of reading VA documents - this was best path to getting data for the last sprints, haven't forgotten the automated pipeline

- For Southwark, we have 180 documents for 58 applications that specifically had viability documents from over the last 6 years
  - For some applications there a number of *scenarios*, that *evolve*, before coming to a *final position*, each step generating VAs
  - We're capturing as many of these possible, to allow the end users to choose what is most helpful

- Undertaking similar work with Tower Hamlets data, combining it into single database

Standardising data

- We have been talking to MHCLG Digital Land Team about data standardisation
  - Looking to align our machine readable planning data work with theirs, that focuses in particular on brownfield development sites
  - Discussions ongoing

- We have now created a schema for viability assessment data:
  - https://github.com/wearefuturegov/planning-viability-doc-schema
  - This can be used to standardise how this data is stored and transferred
  - The schema can be used to validate data before it's used by another system

- Talked to GLA about the option of incorporating VA capture in to Planning Portal in a similar manner to their LDD plans - could be good option to

Product update

DEMO

https://viability-comparison-tool.netlify.com/

Habitable rooms

Sampson House, Hopton Street, SE1

View property

Alscot Road, London SE1 3AG

View property

79-161 Ilderton Road, London, SE16

View property

Jolles House

View property

Gillender Street

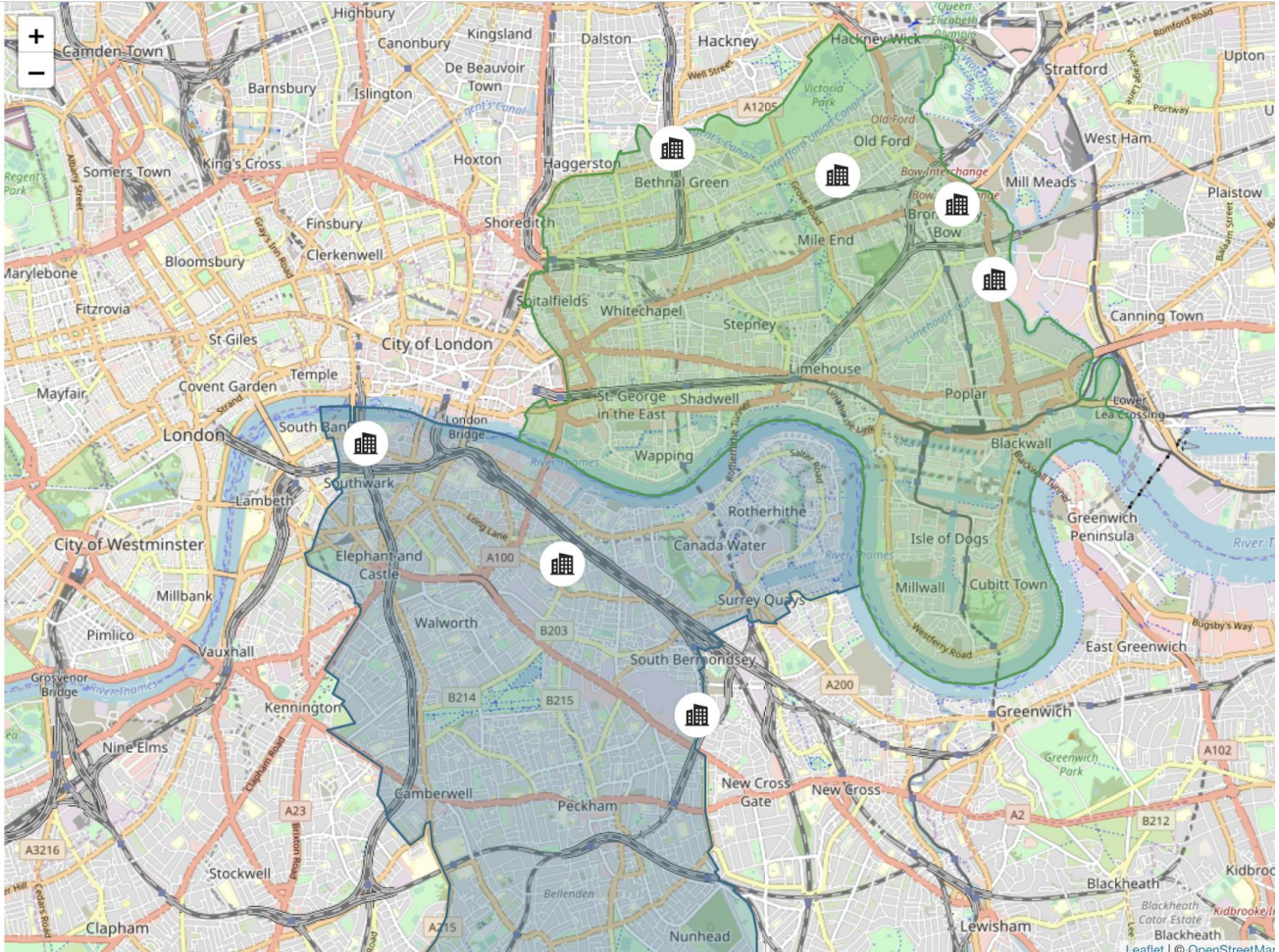
View property

Regency Court

View property

519-523 Cambridge Heath Road

View property



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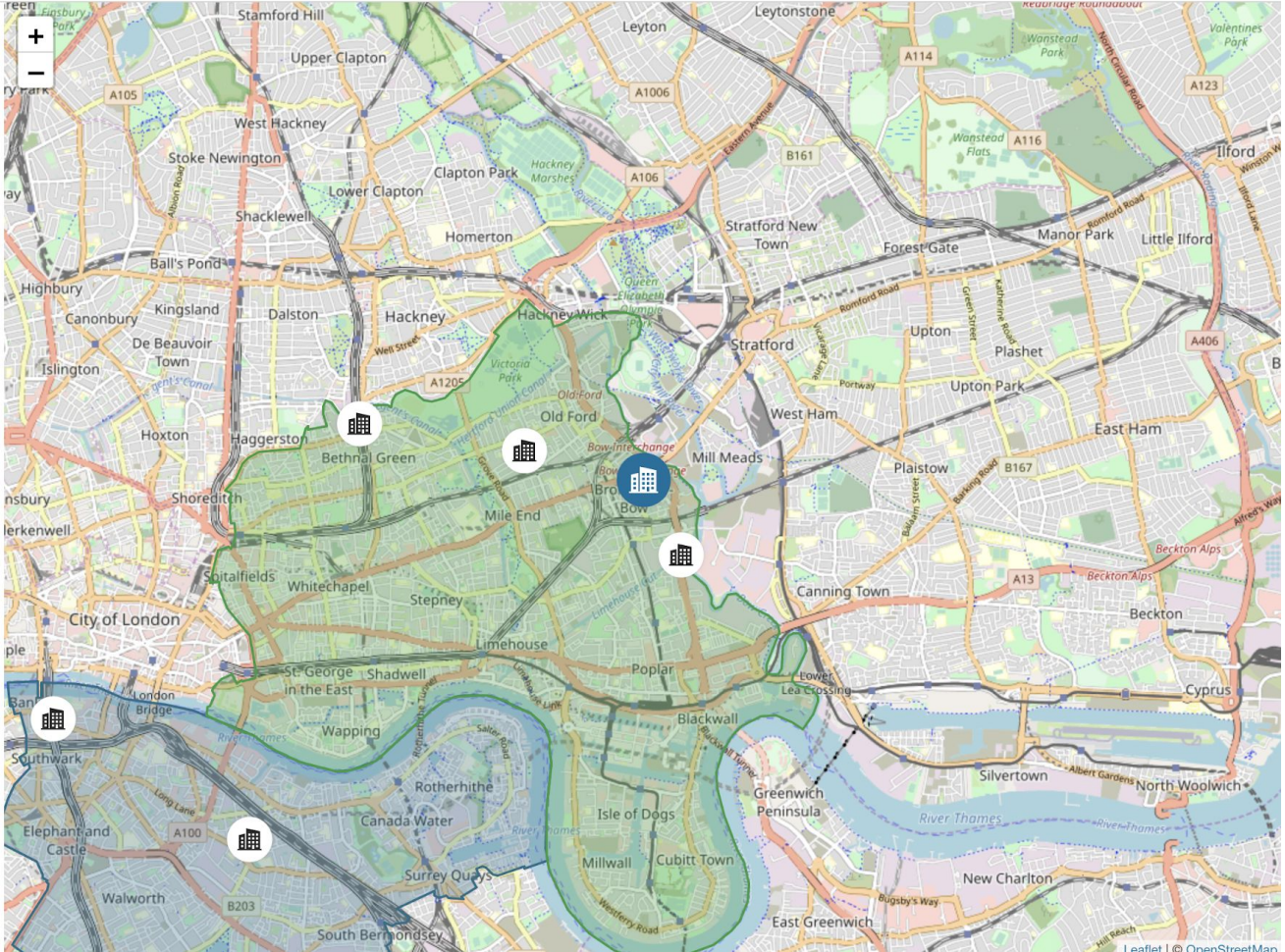


Habitable rooms

Number of habitable rooms

Min 0

Max 900

Clear Save

79-161 Ilderton Road, London, SE16

View property

Jolles House

View property

Gillender Street

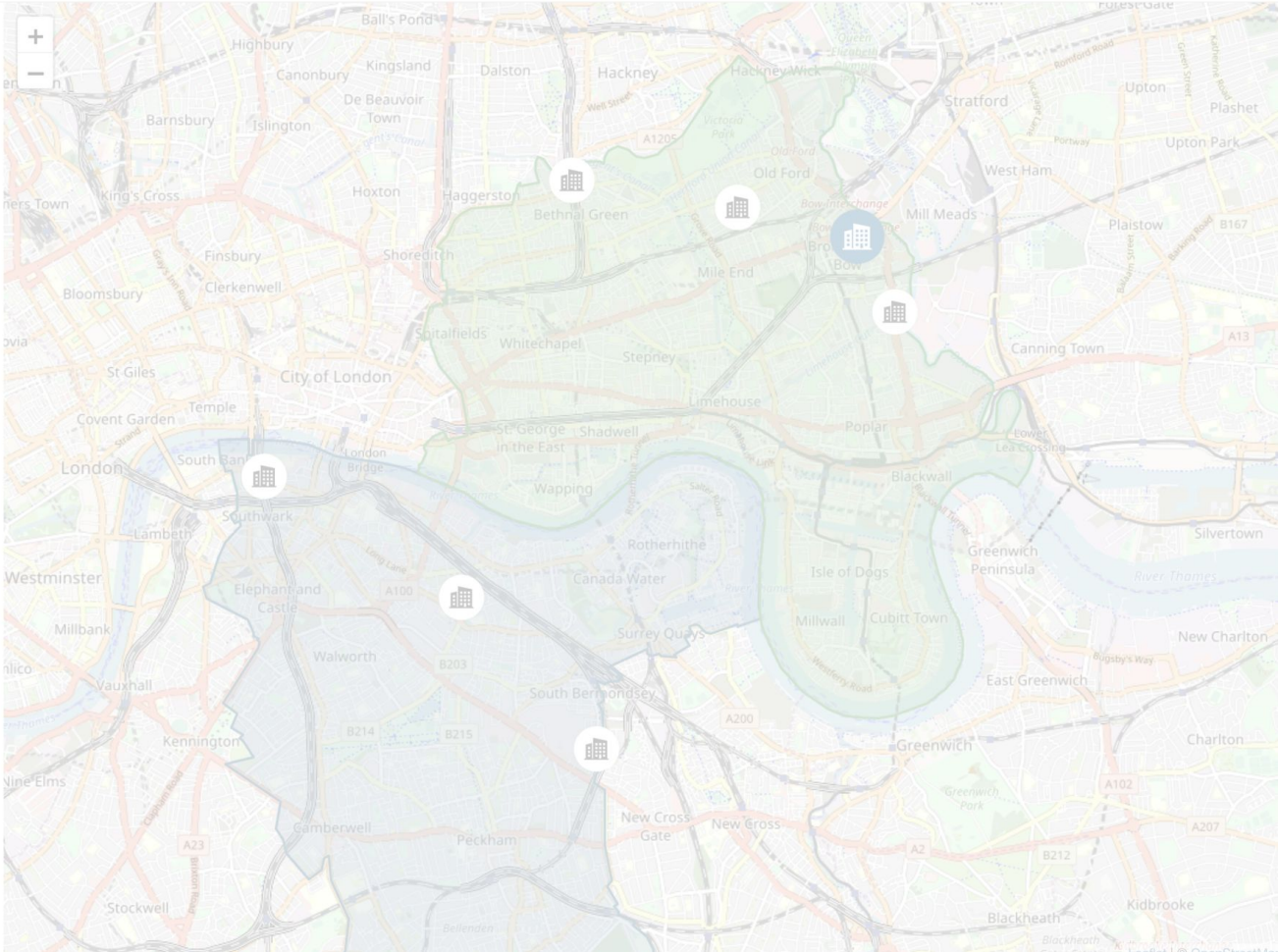
View property

Regency Court

View property

519-523 Cambridge Heath Road

View property



20+ habitable rooms

Jolles House

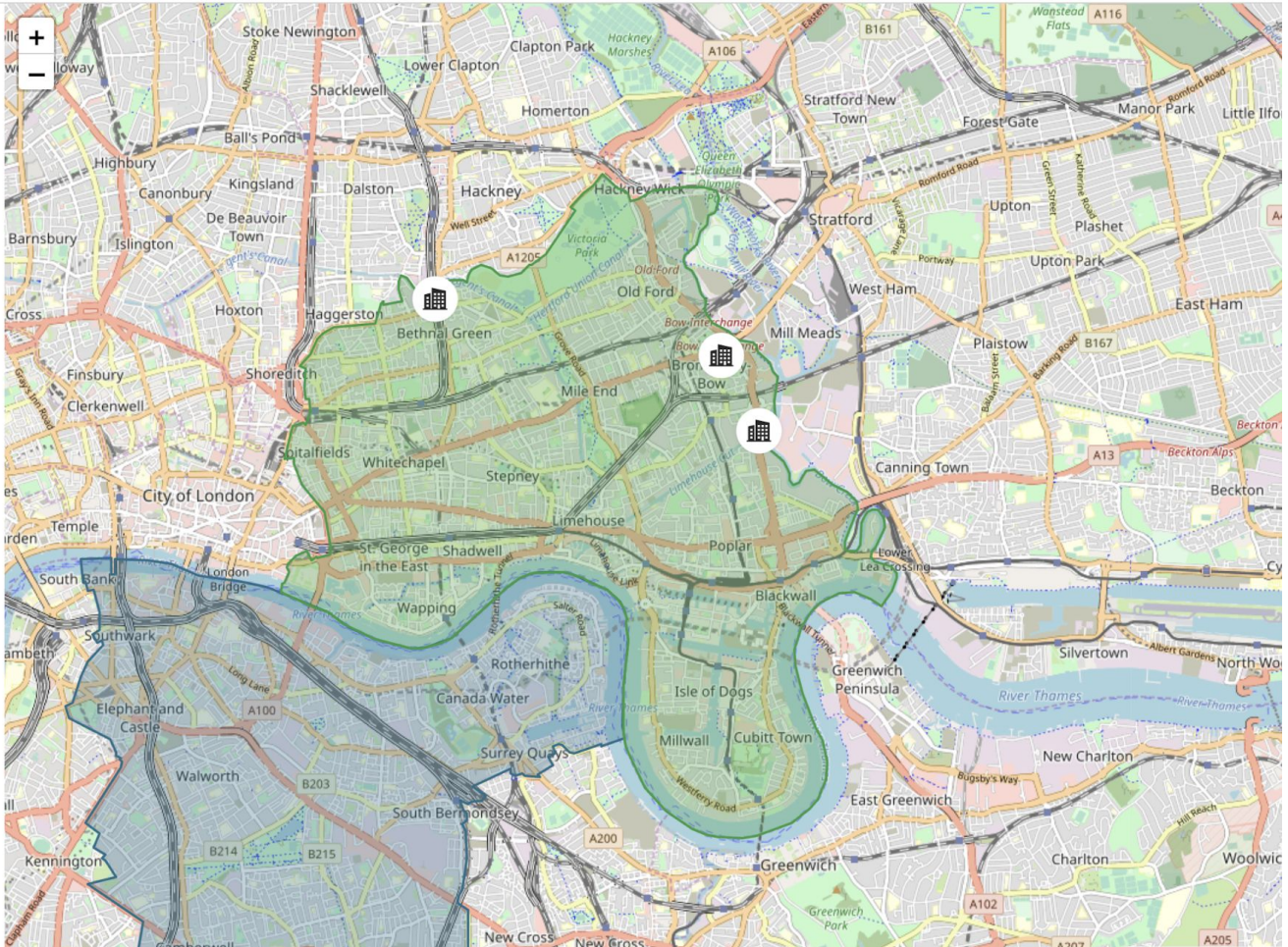
View property

Gillender Street

View property

519-523 Cambridge Heath Road

View property



Impact case

Building the impact case

What we have done:

- Ran a workshop to discuss the audiences of the impact case and what we need to tell these groups
- We have started to discuss what types of impact outputs we need (a business case for funding, a high level impact case to share with wider partners etc)
- Next steps are to outline each output in more detail and start drafting the high level impact case that will tell us what data we need to collect

Key considerations so far:

- There is a wide array of potentially impacted parties from the success of this project long term, we need to be clear about when we want to talk about each of these groups
- Need to make a clear distinction between impact of the *alpha* vs the long term impact of the project / potential tool

What’s next?

Upcoming sprint plan

Sprints	Sprint 5 12/11 - 25/11	Sprint 6 26/11 - 09/12	'Sprint 7' 10/12 - 16/12
Themes	Testing assumptions, continued development, exploring potential impact	Further testing and prototype iteration, planning for further phases	Wrap up
Activities	• Research and testing sessions with case officers, viability officers and viability consultants • Experiment A - Using viability data • Experiment B - Making viability accessible • Adding features to comparison tool • Research to inform impact story • Adding to database of viability assessments	• Experiments A & B mop up • Experiment C - Collecting new data • Data considerations for future work and database handover • Iterating comparison tool • Writing impact case • Plan for future phase(s)	• Documenting findings from research and testing • Summary of data work • Completing final deliverables (blueprint, backlog for future work, impact case) • Ensuring easy and useful handover of knowledge and assets
Key dates	• Show & tell - 25/11	• London Viability Group Meeting - 03/12 • End of alpha activities - 09/12 • Project board - 09/12	• MHCLG meeting - 16/12 • Finish work - 16/12

Questions?

Thank you