

Monitoring Update

Local Authority: Merthyr

To be completed by Welsh Government

To be completed by Local Authority

Scheme Name	Scheme ref	Grant Recipient	Indicative Grant (£)	Number of Homes	Date of Clarification meeting (dd/mm/yy)	Plans received	Scheme Income and Costs spreadsheet received	Technical Sign off Yes/No	Financial sign off Yes/No
-------------	------------	-----------------	----------------------	-----------------	------------------------------------------	----------------	----------------------------------------------	---------------------------	---------------------------

PassivHaus x 8 - Honeysuckle Close	HC036	SL - Merthyr Valley Hom	£839,616	8	18/08/20	No	Yes	In Discussions	
---------------------------------------	-------	-------------------------	----------	---	----------	----	-----	----------------	--

Private Rented property
conversion

HC037

LA

£60,000

3

28/10/20

No

Yes

WG issued Technical and Financial sign off	Final Approved Grant (£)	Land/ Property in ownership of grant recipient?	If no, when will Land/ Property be acquired (dd/mm/yy)	Does your scheme have full planning approval?	Permitted Development Rights or Traditional Route?	If Trad Planning route - planning submission date? (dd/mm/yy)	Anticipated planning approval date? (dd/mm/yy)	SAB approval required?	Estimated Start on Site? (dd/mm/yy)
-------------------------------------------------------------------	-----------------------------------------	------------------------------------------------------------------------	---------------------------------------------------------------------------	----------------------------------------------------------------------	---------------------------------------------------------------------------	------------------------------------------------------------------------------------------	-------------------------------------------------------------------	-----------------------------------	----------------------------------------------------

		Yes		No	PDR			No	25/01/21
--	--	-----	--	----	-----	--	--	----	----------

		Yes		No	Trad	28/09/20	No more than 12 weeks from the submission date	No	01/01/20
--	--	-----	--	----	------	----------	------------------------------------------------	----	----------

Estimated Practical Completion date? (dd/mm/yy)	Is your scheme using MMC?	If Yes - please confirm the type of MMC	Anticipated MMC order date (dd/mm/yy)	Date MMC ordered (dd/mm/yy)	Estimated Grant drawn amount (£) by 31/03/21	Expected Number of homes	Estimated Grant Claim Application Date (dd/mm/yy)
------------------------------------------------------------	----------------------------------	------------------------------------------------	--------------------------------------------------	----------------------------------------	---------------------------------------------------------	---------------------------------	--------------------------------------------------------------

31/03/21	Yes	Beattie Passiv	22/10/20	22/10/20	839,616	8	Please see comments box
----------	-----	----------------	----------	----------	---------	---	-------------------------

31/05/21	No				60,000	3	
----------	----	--	--	--	--------	---	--

Comments
(Please include any issues or additional clarification)

Following a meeting with WG held on 29th October 2020, site plans have been produced and were shown to WG team. Brian has confirmed compliance with Annex D. We are finalising site plans and they will be issued to **WG week commencing 9th November 2020** along with updated cost plans and payment dates to allow sign off.

Our planning consultants are preparing a full planning application as a worst case scenario however we are also discussing with the planning department as to whether this will be handled under Permitted Development Rights. This is TBC but we are preparing for either scenario.

Site Investigations are taking place on 11th November 2020.

The PassivHaus order has been placed and will be complete this financial year ready for placement.

Our external design team are in place working on the project as they have worked with us on another scheme for the same type of MMC. We are procuring groundwork contractors for another scheme which is also for the placement of PassivHaus and we will extend their commission

It's recently come to light that MTCBC are not able to use other sources of WG funding (HSG) for this project, therefore we have a shortfall of £27,000 which neither MTCBC or the landlord are able to fund.

As a result, MTCBC has asked the landlord is consider converting the property into two units instead, in order to reduce the overall costs and keep the project alive. MTCBC are keen to pursue this not only because it will provide us with 2 units of accommodation in the short term but also because we see this as an ideal opportunity to develop the relationship with this landlord and use this as a pilot scheme in the hope that this landlord (and the wider private rented sector) could potentially offer us further accommodation down the line.

MTCBC are hopeful that we will have site of the new plans and revised costs week beginning 9th November. If the project can proceed on this basis then the landlord will need to withdraw the existing planning application and re-submit.

Please note that we haven't updated the columns to the left until we have confirmation as to how we are going to proceed with the scheme.

Guidance on Completion

Scheme Name
Grant Recipient
Indicative Grant (£)
Number of Homes
Date of Clarification meeting
Plans received
Scheme Income and Costs spread-sheet received
Technical Sign off (Yes/No)
Financial sign off (Yes/No)
WG issued notification of Technical and Financial sign off (Yes/No)
Final Approved Grant (£)
Land/Property in ownership of grant recipient?
If no, when will Land/Property be acquired
Does your scheme have full planning approval?
Permitted Development Rights or Traditional Route
Trad Planning route - planning submission date?
Anticipated planning approval date?
SAB approval required?
Estimated Start on Site?
Estimated Practical Completion date?
Is your scheme using MMC?
If Yes - please confirm the type of MMC
Anticipated MMC order date
Date MMC ordered
Estimated Grant drawn amount (£) by 31/03/21
Expected Number of homes
Estimated Grant Claim Application Date
Comments (Please include any issues or additional clarification)

Completed by Welsh Government
Completed by Local Authority

Scheme name from Capital Expenditure Form
The Local Authority or RSL which will receive the grant and own/develop the land/property. PRS schemes will be coded as Local Authority.
The indicative grant level for the scheme which was provided in the indicative allocation
The number of homes indicated in the Capital Expenditure Form
Date of clarification meeting arranged by Relationship Manager
WG to note Yes or No
WG to note Yes or No
WG will confirm, following clarification meetings and follow ups that WG is satisfied with the design of the scheme. Please note for existing dwellings, WG expect to see a small sample. spreadsheet.
WG will issue confirmation that scheme has received Technical and Financial sign off
Following receipt of the grant claim, WG will confirm the final approved grant which is based on actual costs and latest estimated scheme income and costs.
Please confirm Yes or No
Please provide estimated date e.g. 05/10/20
Please confirm Yes or No
Please confirm which planning route your scheme is following using the drop down box
If your scheme does not have full planning, please confirm the date you anticipate your scheme will receive planning. If your scheme does not require planning please leave blank.
If your scheme does not have full planning, please confirm the date you anticipate planning being received.
Please confirm Yes or No
Please provide the estimated Start on Site date e.g. 05/10/20
Please provide the estimated Start on Site date e.g. 05/10/20
Please confirm Yes or No
Please state the type of MMC being used
Please confirm when you anticipate placing an order for your MMC product e.g. 05/10/20
Please confirm the date the MMC is actually ordered e.g. 05/10/20
Please state the estimate amount of Grant you think will be drawn down by 31-Mar-21.
Please state the expected number of homes you will deliver from your grant allocation.
Please confirm when you anticipate submitting your grant claim e.g. 05/03/21
Please provide any comments you think WG would find helpful in understanding this monitoring sheet.

Yes
No
In Discussions

PDR
Trad

Yes
No
Already approved