

Q&A Session Notes 14.1.26

Attended by:

- Charley Chappell (Senior Community Manager – Product)
- Raf Garcia (Vendor Relations and Market Strategy Lead)

Track 1. PlanX funding

Question	Answer
Is there any ongoing commitment past year 1 of PlanX?	No – on GCloud you can select PlanX for a year if you wish. It is hoped that LPAs would find the product valuable and voluntarily wish to continue, however, the generation of a year's worth of data and case study, plus LPA feedback on the product is the delivery outcome of the funding.
If an LPA is already using PlanX, does that rule them out?	No, unless the ODP programme has already provided funding specifically towards co-design and adoption of ODP products.
What will reporting look like, will it be aligned to existing Product funds? Will there be access to the Product community.	<p>The reporting activities will be commensurate to the funding value whilst allowing MHCLG to monitor progress – this is to be confirmed in detail, but the principle is to avoid overly onerous processes. Data will need to be reported monthly to the Monitoring and Evaluation working group, and there may be quarterly check-ins with the Product community manager, for example.</p> <p>The Product community is very actively sharing knowledge and practice currently and it is anticipated that there will be plenty of opportunities for newly funded adopters to access this space. The community manager for Product will facilitate this initially.</p>
Should I rush into publishing datasets when I am withholding them specifically in line with a website project and the datasets are complete? Seconded question.	No, this would be counterproductive – the purpose of the criteria is to ensure that those showing good progression can be selected, it is not intended to be punitive or to force action contrary to strategic ways of working. LPAs are advised to make a note on their application that they have X number of datasets complete and awaiting publication, to briefly describe the driver to delay publication, and to give a date by which these are likely to be available on the platform.
How does planX work with IDOX products and planning portal?	PlanX adoption does not require any major changes to existing architecture – it works alongside Planning Portal, offering something different rather than a replacement.

	<p>Current LPAs put a link on their website to PlanX services or provide the links to selected agents. Those services might be guidance or discretionary e.g. Find out if you need planning permission, or statutory e.g. HH application submissions.</p> <p>PlanX does not currently integrate with IDOX products – there is a project underway to address this. Currently LPAs extract the data from PlanX and feed it into their existing back-office systems.</p>
Will the OSL demos show how customers use the PlanX service "find out if I need Planning Permission", including the back end of how these submissions are stored so we can view them - before the customers decided whether to submit a certificate of lawfulness.	The demos can go through the 'Do I need planning permission' flow including reporting, but will not be able to show how that then feeds into different back-office systems in the demo i.e. demos cover until submission, and what data the LPA has access to on a submitted application. Verbal examples can also be provided re. how existing users translate into specific back-office systems.
Will the demos explain the charging structures i.e. what we could charge the customer and what % goes back to PlanX for each submission.	<p>Regarding % back to PlanX - OSL have a service charge model for any applications wherein the application fee is greater than £100. The Service Charge is £40, and this is collected by LPAs as part of the total application cost and passed onto PlanX on a quarterly basis.</p> <p>There is also a discount model in place where any Service Charge revenue generated above £10k in the year, 50% of that goes towards the following year's subscription. The idea being, as volume increases, PlanX can eventually pay itself off.</p> <p>Service Charges have only recently been rolled out – they are planned for any service with a fee of £100 or more. Some examples would be statutory HH application, or discretionary services (those that LPAs design and set individualised fees for) such as pre-apps.</p>
What is meant by a 'service' being live in PlanX?	<p>Services in PlanX can be built in 3 ways – using the templated service facility provided by OSL, which covers the most popular services e.g. Find out if... and report a breach, by “coping and pasting” services built by other LPAs (these are freely shared across the PlanX community), or by creating from scratch.</p> <p>The funding guideline does not specify which type of service (guidance/discretionary or statutory), or which of the 3 routes for building the service – this is because we want LPAs to have the freedom to choose the service that best suits them to get maximum impact. The service should be one that benefits the public and should be in use to the public after 12 months – this is the only requirement around service design.</p>

	A list of PlanX services currently live to the public will be provided for interested parties to look at for inspiration.
What happens with leftover funding?	In the event of surplus funding following all funding commitments being met, we welcome suggestions from the local planning authority on how the underspend can continue to progress their Digital Planning journey.
When does the 1-year start – can it take into account a later start date to accommodate a strategically useful precursor project or standard procurement processes in LPAs?	<p>Within reason, the start date for the 12 months can be discussed and agreed with the community manager for product. Funding will be available from end of Feb, so ideally the start of March would align with project launch, however, there may be some flexibility dependent on the driver. The 12 months is intended to clarify expectations re. the length of the project – it is not intended as a blocker to access. LPAs are advised to include a note in their application.</p> <p>OSL are confident that 12 months is a realistic timeframe, even considering complex procurement processes. With new templated services, it is a matter of a couple of weeks from start to finish to build and deploy a service, which leaves time to navigate dataset improvements and procurement.</p>
What is the protocol for M&E – are there templates, where are LPAs working alone?	Baseline monitoring will be potentially the most challenging aspect for LPAs, particularly if this is new to them. There is an M&E working group of LPAs collaborating with an MHCLG M&E-focussed staff member – this represents a wealth of experience and knowledge which can be shared. The relevant community manager will also support LPAs to initially get M&E running, likely via a 101 session. The M&E group also provides a template for M&E data return on live services, and this is completed monthly, as a minimum, once services are live.
We are particularly interested in PlanX for enforcement - would that be appropriate?	Absolutely if this is an area that will generate impact for the LPA. Report a breach is one of the most popular services and OSL provide a template which speeds up the build for this service.

Track 2. Incumbent supplier funding

Track	Question / Answer
Does a specific and detailed quote need to be provided at the time of application from a software supplier?	Quotes or estimates from your supplier are useful in determining whether the funding available is at the right level to unlock the improvements you envisage. Along with other documents, they demonstrate greater clarity regarding the work and support the view that the funding will be used to close a gap already defined.

Can some of the funding be used for Project Management?	We understand that most projects require a level of coordination and tracking. Some of the funding can be used for this, provided it supports the remit of modernising the planning service through technology.
Should I rush into publishing datasets when I am withholding them specifically in line with a website project and the datasets are complete? Seconded question.	No, this would be counterproductive – the purpose of the criteria is to ensure that those showing good progression can be selected, it is not intended to be punitive or to force action contrary to strategic ways of working. LPAs are advised to make a note on their application that they have X number of datasets complete and awaiting publication, to briefly describe the driver to delay publication, and to give a date by which these are likely to be available on the platform.
We have been experiencing issues transitioning to our supplier's web-based mapping application for several months. Could the funding be used to resolve this?	Whereas the funding can be used to adopt new technology that helps modernise your planning decision-making, it does not seem that lack of funding is the blocker to adoption here.
Could use the funding be used for a Health Check in preparation for Local Government Reorganisation?	A Health Check involving the supplier and following actions needed is a good example of funding use – great idea to undertake LGR preparation early.
What happens with leftover funding?	In the event of surplus funding following all funding commitments being met, we welcome suggestions from the local planning authority on how the underspend can continue to progress their Digital Planning journey.
Can the funding be used to build a new Back Office Planning System?	This funding is intended to be used with existing software systems. Whereas some development work can be covered by the funding allocation, building or replacing a Back Office System in its entirety is not proportionate to the funding amount being made available.
Is the funding intended to be used strictly on developing technology?	The funding is intended to advance planning decision-making through the use of digital tools, though the work does not need to be of a technical nature. One of the examples provided in the EoI form is specialist training.
Are there financial restrictions regarding the funding, for example whether it should be RDEL or CDEL?	This funding is to be used in relation to CDEL spending overall. Whereas the funding will be granted in the current financial year, it can be spent in FY 2026-2027.