



Planning Aid **Wales**
Cymorth Cynllunio **Cymru**

Business Plan 2020 - 2023

Charity number 1000115

Supporting community
engagement and
involvement in the
planning system in
Wales.



Welcome

As Chair of the Planning Aid Wales Management Board, it is my privilege to write this foreword to our Business Plan. This is a new three-year Business Plan which sets out our objectives, actions and financial planning for 2020-2023. Planning Aid Wales will deliver a range of services to support community involvement in different aspects of the planning system in Wales.

The Management Board recognises the achievements and changes that have taken place during the past year. Planning Aid Wales celebrated its 40th anniversary with a reception at the Senedd. I want to thank the Minister, Julie James AM, for hosting the event and championing meaningful community engagement in the Welsh planning system.

I am also grateful to Welsh Government for their continued support. Planning Aid Wales is uniquely positioned to deliver on aspects of the Well-being of Future Generations Act and help deliver sustainable development.

Looking ahead, this business plan takes into account the impact of the COVID-19 pandemic and we will be proactive in addressing the challenges that have arisen as a result. Over the next three years, Planning Aid Wales will deliver a range of projects and commissions that further support community engagement; we have and will continue to deliver excellent value for money in striving to meet our aims.

Of course, none of this could have happened without the support of our dedicated volunteers, Directors and staff teams over the past 40 years, and I would like to express my heartfelt thanks to them all for their contributions. I am delighted that their efforts have been recognised as Planning Aid Wales has been commended in the RTPI Awards for Planning Excellence for the 'in-house planning team of the year'. Congratulations to all.

Ian Stevens

Chair, Planning Aid Wales

Our priorities for 2020-23:

- 1** Supporting community understanding, involvement and collaboration in the planning system in Wales;
- 2** Facilitating greater community involvement in planning policy preparation and placemaking;
- 3** Developing a range of innovative services to support greater involvement in all aspects of planning; and
- 4** Raising the profile of Planning Aid Wales to attract new volunteers, partners and service users.



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Vision & Values

"For all the people of Wales to be able to fully and effectively participate in a fair, transparent and responsive planning system"



Planning Aid **Wales**
Cymorth Cynllunio **Cymru**

Innovation.

Inclusion.

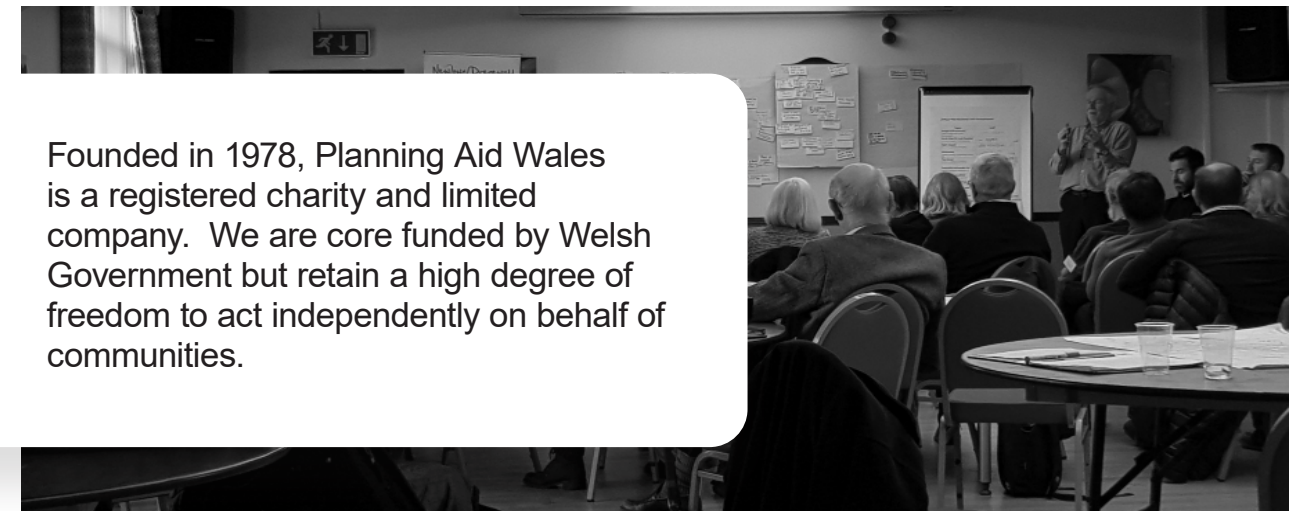
Collaboration.

Independence.

Enabling.

About us

Organisation Overview



Founded in 1978, Planning Aid Wales is a registered charity and limited company. We are core funded by Welsh Government but retain a high degree of freedom to act independently on behalf of communities.

Planning Aid Wales promotes and facilitates engagement and involvement in the planning and placemaking process in Wales for the benefit of people, communities and future generations.

Meaningful community engagement can:

- ✓ Give people a voice and build their skills, confidence and capacity to influence decisions affecting their local area.
- ✓ Improve the quality, appropriateness and relevance of new development.
- ✓ Increase pride in and sense of ownership of the built environment.
- ✓ Foster collaboration between developers, planners and communities, resulting in better schemes.
- ✓ Improve the quality and relevance of planning policy by taking local knowledge into account.
- ✓ Reduce conflict, speed up and reduce costs in the development management process.

About us

Delivering Wellbeing



Planning Aid Wales subscribes to and seeks to uphold the principles and purpose of the Well-being of Future Generations Act 2015 and the definition of Sustainable Development contained within. Our work contributes directly to the delivery of four well-being goals as defined in the Act:

A more equal Wales. By supporting people through our Helpline, training and community engagement support services, Planning Aid Wales helps more people to participate and articulate their views in planning decisions that affect them.

A Wales of cohesive communities. By supporting Community and Town Councils to involve their own communities in planning decisions and Place Plan preparation, Planning Aid Wales helps to bring communities together and build consensus on important matters that affect them.

A Wales of vibrant culture and thriving Welsh language. Planning Aid Wales supports community involvement in Local Development Plan and Place Plan preparation, which, when delivered effectively, can protect and enhance Welsh culture and language. Planning Aid Wales is a bilingual organisation and offers all of its services in the medium of Welsh.

A globally-responsible Wales. Through the delivery of our services, Planning Aid Wales helps communities to understand and respond to global issues such as climate change through the planning system.

Planning Aid Wales also incorporates the five ways of working into all aspects of our work (involvement; collaboration; integration; prevention; and long-term factors) and is proud to be an active contributor to Placemaking Wales.

Planning Aid Wales can help deliver a community-led, community-owned, community-driven, and community-loved planning system.

Our wellbeing commitments:

1. We will demonstrate how all aspects of our work contribute to the delivery of wellbeing goals and ways of working.
2. We will carry out an annual assessment and review to assess how our work contributes to the delivery of wellbeing goals.

About us

Our Services & Activities

Our core funded services and activities help individuals and communities understand and engage with the planning process and encourage collaboration between communities and planning authorities.



Helpline

Over 250 calls / year.
Eligible callers are
advised by volunteers.



Training

8 courses for
Community Councils
each year.



Network Events

4 mini-conferences for
planners, developers
and communities / year.



Research & Guidance

Engagement research
and preparing easy-
read guidance



Newsletters

Planning news distributed
to 1,000 community
representatives 6x / year.



Policy Review

Responding to planning
policy consultations as an
advocate of communities.

Commissioned projects and services help us take our work further and explore innovative engagement approaches.



Bespoke Training

We can tailor our range of courses or create new training courses on any planning topic for your group, e.g. 'Getting ready for Place Plans' is a 2.5hr course developed on request.



Online Training

Our Online Training Platform will launch in April 2020 with our flagship video course 'Planning: From Start to Finish'. We can develop custom online courses for your audience.



Place Planning

We can offer support services to Community and Town Councils, Local Planning Authorities and community groups in the preparation of Place Plans.



Guidance Preparation

We can research and prepare easy-read guidance on any planning topics and produce guidance summary videos in English and Welsh.



Engagement Support

We can advise on community engagement strategies and facilitate workshops e.g. supporting community engagement in Local Development Plan or Place Plan preparation.

About Us Our People



Management Board

15 Company Directors / Trustees

Chief Executive

James Davies

Community Engagement & Development Officer

Deb Jeffreys

Planning Engagement Officer

Karen Probert

Planning Engagement Officer

Mark Jones

Finance & Administration Officer

Kay Sharman

Helpline Administrator

Rosa Thomas

Volunteers

Our 40+ volunteers come from a wide range of planning backgrounds and support the delivery of our activities, including our helpline service, training courses, policy reviews and guidance preparation.

Office Placements

We host up to four voluntary office placements per year.



Our Management Board

Planning Aid Wales is governed by a Management Board which sets strategy, ensures that activities align with charitable objectives and resources are used effectively. The Board is made up of a maximum of fifteen volunteer trustee directors. Directors represent a broad cross-section of planning and related interests and are drawn from different sectors and geographical areas.

The Management Board subscribes to the Nolan principles and to WCVA guidance on good governance. The Board meets at least four times each year and reports on our progress and financial position at our Annual General meeting. Directors also contribute to working groups on staffing, policy & research, communications and fundraising matters. For more information about the Management Board, see:

www.planningaidwales.org.uk/about-us/directors



Volunteering with us...



- counts towards Continuing Professional Development
- provides a useful 'reality check' by giving new perspectives on how the general public interact with the planning system
- gives insights into new areas of planning activity
- broadens experience of how other local authorities and / or sectors operate
- widens professional networks
- provides valuable experience of community consultation and capacity-building
- refreshes interest and opens up new opportunities
- gives access to low-cost, relevant training
- allows planners who have retired, taken a career break, or work outside mainstream planning to keep up-to-date with planning.

Analysis

SWOT Analysis



SWOT



Strength

We are a charity with a unique focus and remit in Wales.



Weakness

We are too dependent on our Welsh Government core grant.



Opportunity

Our Online Training could be a revolutionary income source.



Threat

Competition may affect some of our services and income sources.

Strengths

- » Excellent staff team (finalist for RTPI UK Awards).
- » Very strong in-house digital skills.
- » Long history of quality delivery.
- » Growing network of volunteers.
- » Committed Board.

Weaknesses

- » Growing but still low awareness of our services.
- » Need to generate additional income.
- » Undersell our value and outcomes.
- » Volunteer development.
- » Board recruitment.

Opportunities

- » Growing recognition of need for better community engagement.
- » Wide range of online opportunities to grow our reach.
- » Interest from a number of new potential partners.

Threats

- » Growing competition from community engagement providers.
- » Reduction / loss of core grant.
- » Staff capacity at peak periods.
- » Loss of experienced Directors.

Analysis

Planning Aid Wales' role

As *the* community engagement organisation in planning in Wales, our role is to build understanding of the planning system, support better engagement in local planning and encourage collaboration between communities, planning authorities and developers. By giving people a voice in the planning system, we help create a

more equal Wales with more cohesive communities.

This role is built on a clear understanding of our own organisation and our operating environment, which has informed our strategic priorities for the next three years.



Planning for growth.



We will maximise our opportunities by capitalising on our strengths.

2020-2023

Strategic Priorities



During the lifetime of this plan, Planning Aid Wales will be innovative in maximising our opportunities by capitalising on our strengths.

We will grow as an organisation by overcoming our weaknesses and we will be diligent in managing risk to mitigate our threats.

In order to achieve our vision for all the people of Wales to be able to fully and effectively participate in a fair, transparent and responsive planning system, during the three-year lifetime of this plan, Planning Aid Wales will:

1

With Welsh Government funding, deliver a range of core services to support community understanding, involvement and collaboration in the planning system in Wales.

2

Subject to funding, facilitate greater community involvement in planning policy preparation and placemaking.

3

Subject to funding, develop a range of innovative services to support greater involvement in all aspects of planning.

4

Raise the profile of Planning Aid Wales to attract new volunteers, partners and service users.



2020 - 2021 Year 1 Objectives

COVID-19. The following activities have been adjusted in response to the Caronavirus pandemic. Delivery of a new research project as part of the core grant has reduced the number of events. This will be reviewed for year 2.

1. With Welsh Government funding, Planning Aid Wales will support community understanding, involvement and collaboration in the planning system in Wales by:

- 1.1 Delivering a new research project to determine the value of community engagement in the planning process in Wales.
- 1.2 Delivering 6 online training seminars for CTCs in Wales.
- 1.3 Delivering 1 network events for planners, developers and communities to come together, learn from each other and share their experiences and best practice (online or face-to-face).
- 1.4 Providing a free, high quality planning advice helpline service to eligible members of the public.
- 1.5 Circulating 6 bi-monthly Planning4communities newsletters, sharing best practice in community involvement in planning as well as organisational news.
- 1.6 Participating in relevant reviews and studies, and providing input into emerging Welsh Government policy and processes as an advocate of communities and community engagement in planning.
- 1.7 Continuing to provide, add to and update the free planning information and advice on the Planning Aid Wales and Place Plans websites.

2. Subject to funding, Planning Aid Wales will facilitate greater community involvement in planning policy preparation and placemaking by:

- 2.1 Exploring the case for a new public national planning policy forum to facilitate greater understanding and participation in national policy consultations.
- 2.2 Providing support to LPAs to facilitate greater involvement in LDP preparation.
- 2.3 Providing direct support to CTCs and community groups to prepare Place Plans.
- 2.4 Supporting Welsh Government's placemaking agenda as an advocate of community involvement in the planning process.
- 2.5 Secure funding for new projects that build understanding of planning policy and placemaking in Wales.

3. Subject to funding, Planning Aid Wales will develop a range of innovative services to support greater involvement in all aspects of planning by:

- 3.1 Rolling out our online video training platform to increase Community and Town Councillor understanding of the planning process.
- 3.2 Developing new video training platforms in collaboration with other organisations.
- 3.3 Developing new and innovative information and training products that promote greater understanding and involvement of all aspects of the planning system.
- 3.4 Seeking funding to review the value of community engagement in the planning process in Wales, including opportunities to involve new and hard to reach audiences in planning.

4. Planning Aid Wales will raise its profile to attract new volunteers, partners and service users by:

- 4.1 Raising the profile of Planning Aid Wales, its free and paid services and volunteering opportunities amongst the planning profession, associated professions and the third sector.
- 4.2 Raising awareness of our core services amongst higher eligibility and hard to reach audiences.
- 4.3 Increasing audience numbers and engagement in Planning Aid Wales' websites and social media platforms.



2021 - 2023

Years 2 & 3 Objectives

Priority 1 (core services)

- Comprehensively review all core services, assessing appropriate levels and format of services (e.g. online vs. traditional methods).
- Developing plans to grow selected core services.

Priority 2 (policy engagement)

- Growing the new policy forum, if established.
- Seeking funding for new training projects around placemaking.

Priority 3 (broader engagement)

- Growing our online training platform by adding further courses.
- Developing new projects to support engagement in the planning process.

Priority 4 (profile raising)

- Review and build on progress for targetting growth in service users, volunteers and partners.

Finance & Risk



Finance & Risk

Financial Planning

Planning Aid Wales currently receives £121,500 annual core grant funding support from Welsh Government. Over the past year, we generated additional income from project commissions (circa. £42,000).

The COVID-19 pandemic has introduced significant uncertainty into financial planning; pressures on government resources is likely to decrease the availability of additional project grants and commissions. We anticipate a total annual income of around £140,000 in the 2020/21 financial year, potentially to increase in subsequent years.

Planning Aid Wales has a policy of maintaining unrestricted reserve funds totalling £61,500. This is in keeping with Charity Commission guidance which advises charities to maintain sufficient reserves to even out variations in funding flows. £10,000 was invested in significant upgrades to IT infrastructure in the 2019/20 financial year in order to help PAW deliver innovative online services and a further £5,000 reserve has been established to facilitate an office relocation should it be required during the 2020/21 financial year.

This Business Plan seeks clearly to identify those work requirements and outputs which can reasonably be provided within the current level of core grant received from Welsh Government, (Strategic Priority 1) and those which will require additional funding support to undertake (Strategic Priorities 2&3). PAW will ensure that the time its staff and trustees spend on income generation activities will not detriment the delivery of our core activities. This will be monitored via a 'prospect list' which will be reported on at quarterly meetings.

The majority of our funding (~80%) is expended on staffing, whilst the remainder is spend on office and organisational running costs. Planning Aid Wales utilises a Full Cost Recovery model in all project commissions. For medium and larger projects, additional staff resources are required to meet the demands of those projects.

During the next year, we anticipate additional funding streams will include:

- Sales of subscriptions to our new Online Training Platform.
- Commissions from Community and Town Councils to support Place Plan preparation.
- Bespoke training commissions from a range of audiences.
- Commissions from planning authorities to deliver engagement services as part of LDP reviews.
- Other trading activity / commissions.
- Donations.

Finance & Risk

Risk Management - Key Risks

The Management Board routinely reviews risk and seeks to incorporate appropriate mitigating actions when developing strategy. The Board have considered this Business Plan and have identified the following key risks to the organisation during the plan period. Full consideration of risks to the organisation are contained in the Planning Aid Wales Risk Management Framework. Specific risks relating to the COVID-19 pandemic were addressed at the start of the pandemic and were taken into account in the following key risks.

Strategic

There is an over-dependency on annual Welsh Government Core Grant settlement. Core funding could be lost or reduced.

Efforts to secure funding for new projects could be unsuccessful, increasing dependence on core grant.

Mitigations

Focus on generating new sources of income.

Review reserve levels annually

Capitalise on opportunities for WG support

Greater focus on trading in business plans.

Mitigations

Focus on generating alternative sources of income, particularly through trading.

Invest reserves in Research & Development

Work in partnership with others.

Business Development Working Group to consider new opportunities.

Environmental

Competition from similar organisations could inhibit opportunities for income generation.

Mitigations

Introduce competitor analysis framework.

Develop case studies demonstrating the value PAW offers.

Explore joint working / partnership opportunities wherever possible.

Operational

Security of online platform - copyright theft could limit income generation.

Mitigations

Explore software solutions to security issues / concerns with IT experts.

Add watermarks / logos to all videos.

Test solutions prior to launch.

Appendix

Action Plan 2020-21



	Objective	Target(s)	Dates	Responsible
1. Build understanding, collaboration and involvement in planning	1.1. Deliver value of community engagement in planning research.	Initiate project and deliver as per proposal	June 2020	CEx / PEO
		Mid-point project meeting	August 2020	CEx
		Final report	October 2020	CEx
	1.2. Six online seminars for CTCS.	Devise programme of events to commence in September 2020 and advertise.	Q2	CEDO.
		Deliver one event per month.	Monthly from September 2020.	CEx / PEO.
	1.3. One network event.	Devise and deliver one event in Q4, face-to-face providing it is safe to do so (otherwise online).	Q4	PEO
	1.4. Helpline service.	Continue to deliver high-quality helpline service, monitoring and addressing demand as required.	Ongoing	HA / CEx
		Develop new software to manage helpline calls.	Q1	CEx
	1.5. Six newsletters.	Publish six Planning4communities newsletters	Bi-monthly	CEDO / PEO
	1.6. Policy & research input.	Respond to relevant consultations	As arising / ongoing	PRWG/Staff
		Consider opportunities to widen research / policy input	Q3	PRWG/Staff
	1.7. Website guidance updates.	Undertake review and develop action plan to update and broaden guidance on PAW website	Q1	PEO/HA/Vols

	Objective	Target(s)	Dates	Responsible
2. Subject to funding, facilitate greater involvement in policy and placemaking	2.1. Explore case for national planning policy forum.	Discuss potential / prepare proposal for external funders	Q3	CEx / PRWG / Board
	2.2. Support LPAs in LDP involvement.	Discuss opportunities with POSW	Q3	CEx / Board
		Deliver commissions as they arise	As required	PEO
	2.3. Support CTCs in Place	Deliver commissions as they arise	As required	PEO
	2.4. Support Placemaking.	Sign Placemaking Wales charter and continue to participate in initiative.	Q2	CEx
	2.5. Secure funding for new placemaking / policy engagement projects.	Identify and develop potential opportunities.	Q3	CEx / PRWG / SBDWG
	Objective	Target(s)	Dates	Responsible
3. Subject to funding, develop innovative engagem entprojects	3.1. Roll out online training platform for CTCs.	Launch platform	Q1	CEDO/CEx
	3.2. Developing new video training with other organisations.	Explore opportunities with 3 new organisations	Q4	CEx/PEO
	3.3. Developing new innovative training / information products.	Develop funding proposals	Q3	STAFF/ SBDWG
	3.4. Seeking funding to review the value of community engagement in the planning process in Wales.	Deliver as part of core programme (see 1.1)	Q2	PEO/CEx/ PRWG

Objective		Target(s)	Dates	Responsible
4. Raise the profile of Planning Aid Wales	1. Raise the profile of PAW services and volunteering opportunities.	Develop opportunities to engage with the private sector.	Q2	SBDWG / PEO
		Build stronger links with POSW, Young Planners Cymru and other organisations within the profession.	Q4	CEx / SBDWG
		Speak at 2 external events	Q4	CEx
		Submit 2 articles to The Planner and 2 to Cynllunio	Q2, Q4	CEx
		Participate in RTPI National and RTPI Cymru awards	Q1, Q4	Chair / CEx
	2. Raise awareness of our core services amongst higher eligibility and hard to reach audiences.	Explore and develop a range of social media opportunities to raise awareness with potential service users	Q2	CEDO/ SBDWG
	3. Increasing audience numbers and engagement in Planning Aid Wales' websites and social media platforms.	Increase number of followers on Twitter and Facebook and YouTube.	Quarterly	CEDO
		Establish profiles on new social media channels.	Q1	CEDO
		Develop and implement monthly schedule of posts	Q1 / ongoing	CEDO
		Develop above opportunities to increase usage of PAW website.	Quarterly	CEDO