



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

Business Plan

2024 – 2027

Charity number 1000115

Supporting community engagement and involvement in the planning system in Wales

Welcome

This year, to ensure continuity, the chair position has been shared between Francesca Sartorio and Derek Hobbs. It is our pleasure to report that the organisation continues to provide an excellent service to the citizens of Wales, to embrace change, to learn, to develop and grow.

Once again, environmental issues and worsening housing shortage have kept “planning” in the national headlines. The services that Planning Aid Wales (PAW) delivers are therefore in ever increasing demand and we have considerably enlarged the pool of groups and organisation we work with.

One area of work particularly requested has been the increase in the commissioning of citizen engagement work. During the year, PAW has carried out several engagement activities on behalf of local authorities, many developing their replacement LDPs. We have the advantage in being independent, from both LPAs and from commercial organisations which may have business related interests in development projects, and this greatly aids our skills and ability to engage effectively with communities. Not everybody values that independence, particularly at times when technical decisions are instrumentally used to gain political wins, but our charitable status means that we can hold firm and only take on commissions which have the intent of accurately gathering the opinion of the public without fear or favour.

Over the next two years, PAW will deliver a range of core activities, projects and commissions that build and support meaningful community engagement and effective sharing of knowledge of the planning process. Our volunteer structure ensures we will continue to deliver excellent value for money in striving to meet our aims. Indeed, PAW continues to deliver excellent value for money overall, with a high level of leverage adding value to our Welsh Government funding base.

The continued progress that we celebrate could not have happened without the leadership of our CEO and the support of our dedicated volunteers, Directors, and staff teams, and we would like to express our heartfelt thanks to them all for their contributions.

Francesca Sartorio & Derek Hobbs
Co-Chairs, Planning Aid Wales

Our priorities for 2024-2027:

1. With funding from Welsh Government, deliver a range of core services to support community understanding, collaboration, and involvement in the planning system in Wales.
2. Build the capacity of Planning Aid Wales to deliver benefit to more service users and deliver more services.
3. Raise awareness and understanding of processes that can help people shape their environment.

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Vision & Values

Our mission:

To promote and facilitate involvement in planning, place planning and placemaking processes in Wales for the benefit of people, communities, and future generations.

Our vision:

"For all the people of Wales to be able to participate fully and effectively in decisions that affect the varied environments in which we live."

Our values:

Innovation. Inclusion. Collaboration. Independence. Enabling.

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 dependently 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.

Delivering well-being

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 a signatory of the Placemaking Wales Charter.

During the lifetime of this business plan, Planning Aid Wales will seek to work with the Well-being of Future Generations Commissioner's Office in order to strengthen our impact in relation to the Well-being of Future Generations Act.

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.** We help over 350 callers with planning queries per year. Eligible callers are advised by qualified planning volunteers

- **Training.** We deliver 8x 2.5hr planning training courses for Community Councils each year.
- **Network Events.** We deliver 4 mini-conferences for planners, developers and communities per year.
- **Research & Guidance.** We undertake research on community engagement and prepare accessible guidance on planning matters.
- **Newsletters.** Planning news is distributed to over 1,100 community representatives six times per year.
- **Policy Review.** We respond 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 launched in April 2020 with our flagship video course 'Planning: From Start to Finish'. We have developed and delivered online training on all aspects of the planning system for elected members, town and community councils and NGOs.
- **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.

Our People

Staff

Engagement & Development Officer
Deb Jeffreys

Finance & Administration Officer
Kay Sharman

Planning Engagement Officers
Karen Probert
Mark Jones

Helpline Administrator
Rosa Thomas

Chief Executive
James Davies

Volunteers

We have over 30 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. We host up to four voluntary office placements per year.

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 the Wales Council of Voluntary Action's 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

SWOT Analysis

Strengths

- » We are a charity with a unique focus and remit in Wales.
- » Established reputation with long history of quality delivery.
- » Rising project commissions
- » Excellent committed staff team.
- » Very strong inhouse digital skills.
- » Growing network of volunteers.
- » Committed Board.

Weaknesses

- » Dependency on Welsh Government core grant.
- » Need to generate additional income.
- » Additional staffing capacity needed at peak times.
- » Do more to sell our value and outcomes we deliver within sector.
- » Volunteer engagement outside casework could be better.

Opportunities

- » Increasing interest in PAW services from Local Planning Authorities.
- » Broader recognition of value of engagement across sectors.
- » Enormous in-house knowledge and experience to be reflected in our guidance.
- » Wide range of online opportunities to grow our reach.
- » Opportunity to build partnerships in the wider environmental and social housing sector.
- » Building on PAW's work on the value of engagement.

Threats

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

Planning for Growth

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. To achieve our vision during the three-year lifetime of this plan, Planning Aid Wales will:

1. With funding from Welsh Government, deliver a range of core services to support community understanding, collaboration, and involvement in the planning system in Wales.
2. Build the capacity of Planning Aid Wales to deliver benefit to more service users and deliver more services.
3. Raise awareness and understanding of processes that can help people shape their environment.

Objectives

With funding from Welsh Government, Planning Aid Wales will deliver the following core services to support community understanding, collaboration, and involvement in the planning system in Wales:

- 1.1 Deliver a minimum of 8 training events for CTCs in Wales.
- 1.2 Deliver a minimum of 4 network events for planners, developers, and communities to come together, learn from each other and share their experiences and best practice.
- 1.3 Provide a free, high quality planning advice Helpline service to eligible members of the public.
- 1.4 Circulate 6 bi-monthly 'Planning with Communities' newsletters, sharing best practice in community involvement in planning as well as organisational news.
- 1.5 Participate in relevant reviews, studies, and provide input into emerging Welsh Government policy and processes as an advocate of communities and community engagement in planning.
- 1.6 Rebuild the Planning Aid Wales and Place Plans websites, ensuring the guidance contained within is up to date and reflects our growing experience.

Build the capacity of Planning Aid Wales to benefit more users and deliver more services.

- 2.1. Update all PAW guidance materials, including our core website and Place Plans website to reflect changes to the planning system and to better reflect and address PAW knowledge, experience and lessons learned from engagement activities.
- 2.2. Explore opportunities to develop PAW's research capabilities.
- 2.3. Raise the profile of Planning Aid Wales, our free and paid services and volunteering opportunities amongst the planning and wider environment sector.
- 2.4. Improve PAW's capacity to deliver existing and new services by appointing new associates.
- 2.5. Deliver activities that raise awareness and celebrate the value of engagement in planning.
Raise awareness and understanding of processes that can help people shape their environment.
- 3.1. Subject to funding, develop and deliver projects that address recommendations in PAW's value of engagement research.

- 3.2 Subject to funding, deliver further activities that facilitate community involvement in Strategic Development Plan preparation.
- 3.3. Subject to funding, provide support to Local Planning Authorities to facilitate greater involvement in Local Development Plan preparation and review.
- 3.4. Where resources allow, provide direct support to Community and Town Councils and community groups to prepare Place Plans.
- 3.5. Continue to act as an advocate of community involvement in the planning process.
- 3.6. Develop new partnerships and opportunities with a wide range of stakeholders from the environment sector.

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, our new online training platform and online training events. During the 2023/24 financial year, the organisation generated a total of £84,179.83 in project income.

Whilst interest in PAW and project commissions remain buoyant in the short-medium term, we anticipate a more moderate total income of around £166,500 in the 2024/25 financial year with an increased emphasis on organisational development in the first part of the year to be met by utilising unallocated reserves. The outlook for subsequent years in this business plan remains uncertain, but a 'break-even' budget is considered deliverable for subsequent years in the business plan.

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 be to the detriment of the delivery of our core activities.

This will be monitored via a 'prospect list' which will be reported on at quarterly meetings. During the next year, we anticipate additional funding streams will include:

- Commissions to provide engagement support to Local Planning Authorities on Local Development Plan preparation in Newport and Cardiff.
- A commission to prepare draft Supplementary Planning Guidance on Place Plan preparation and conformity in Conwy.
- A commission from Welsh Government to prepare guidance on Strategic Development Plans for communities.
- Commissions that support very early-stage engagement in the provision of social housing.
- Bespoke training commissions from a range of audiences.
- Sales of subscriptions to our new Online Training Platform.
- Other trading activity / commissions.
- Donations.

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.

Strategic

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

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.
Capacity to deliver business plan objectives and / or project work could be insufficient.
Prioritise core grant objectives. Appoint new associates in first half of year.

Legal and Compliance Risks

Difficulties in Health and Safety compliance – need for more staff support options in delivery of events.

Mitigations

Prioritise appointment of associates.

Operational

Customers could become dissatisfied with service provided by PAW – increasing backlash on social media over dissatisfaction with Local Planning Authorities who PAW is working on behalf of.

Mitigations

Ensure communications plans are prepared for each commission.

APPENDIX: Year 1 Action Plan – 2024/25

Objective 1: Build understanding, collaboration, and involvement in planning

Objective	Target(s)	Dates	Responsible
1.1. Eight online seminars for CTCS	Devise programme of events to commence in May 2023 and advertise	Q1	CEDO
	Deliver one event per month.	Monthly from June 2024	PEO / CEx
1.2. Four network events	Devise and deliver one event quarterly (online and face-to-face)	Quarterly	PEO
1.3. Helpline service	Continue to deliver high-quality helpline service, monitoring and addressing demand as required.	Ongoing	HA / CEx
1.4. Six newsletters	Publish six <i>Planning with Communities</i> newsletters	Bi-monthly	CEDO / PEO
1.5. Policy & research input	Respond to relevant consultations	As arising / ongoing	PRWG/Staff
1.6. Website guidance	Rebuild PAW and Place Plans websites	Q2	CEx / CEDO

Objective 2: Build the capacity of Planning Aid Wales to deliver benefit to more service users and deliver more services.

Objective	Target(s)	Dates	Responsible
2.1. Update all PAW guidance materials, including our core website and Place Plans website to reflect changes to the planning system and to better reflect and address PAW knowledge, experience and lessons learned from engagement activities.	Commission Marketing / Website Associate.	Q1	CEx / CWG
	Review website content and existing guidance	Q1	PEO / CEx
	Prepare new marketing materials – service brochures / case studies etc.	Q2	CEx / CWG
	Prepare new guidance based on project outputs and learning from recent years	Q2	CEx / PEO
	Relaunch PAW and Place Plans Websites by September 2024	Q2	Staff
2.2 Explore opportunities to develop PAW's research capabilities.	Explore Knowledge Transfer Partnerships Funding and submit proposal if feasible.	Q1	CEx / PRWG

2.3. Raise the profile of Planning Aid Wales, our free and paid services and volunteering opportunities amongst the planning and wider environment sector.	Update and develop communications strategy based on external feedback.	Q1	CWG
	Prepare programme of messages to raise awareness of PAW as 'thought leaders' on social media / newsletters and launch	Q2	CEx / CEDO / CWG / PEO
2.4. Improve PAW's capacity to deliver existing and new services by appointing new associates.	Appoint Marketing Associate	Q1	CEx / CEDO
	Devise briefs and schedule recruitment exercise dates and launch.	Q1	CEx / CEDO
	Appoint 2x Planning and 2x Administrative Associates	Q2	CEx / CEDO
	Adopt and Publish Employment Handbook	Q1	CEx / MBEC
2.5. Deliver activities that raise awareness and celebrate the value of engagement in planning.	Create separate guides / articles on value of engagement findings and release via website / social media / newsletters	Q2	CEx / CEDO

Objective 3. Raise awareness and understanding of processes that can help people shape their environment.

Objective	Target(s)	Dates	Responsible
Subject to funding, develop and deliver projects that address recommendations in PAW's value of engagement research.	Explore Knowledge Transfer Partnerships Funding and submit proposal if feasible.	Q1	CEx / PRWG
	Explore alternatives if above unsuccessful	Ongoing	CEx / PRWG
Subject to funding, deliver further activities that facilitate community involvement in Strategic Development Plan preparation.	Deliver new <i>Guide to Strategic Development Plans for Communities</i> with Welsh Government funding	Q1	CEx
	Identify opportunities for further SDP engagement projects	Q4	CEx / PEO
Subject to funding, provide support to Local Planning Authorities to facilitate greater involvement in Local Development Plan preparation and review.	Provide support to Local Authorities to engage communities on LDP production.	Q4	PEO
	Support Conwy CBC in production of SPG on Place Plan production and conformity	Q2	CEx

Where resources allow, provide direct support Community and Town Councils and community groups to prepare Place Plans.	Prioritise the production of guidance and training. Consider further requests to provide direct support where it is viable to do so.	Q2 / ongoing	PEO / CEx
Continue to act as an advocate of community involvement in the planning process.	Raise PAW profile as 'thought leader' on website guidance and in social media messages	Q2	Staff
Develop new partnerships and opportunities with a wide range of stakeholders from the environment sector.	Reach out to POSW and share new marketing materials	Q2	CEx
	Engage with Office of Future Generations Commissioner	Q2	CEx / PEO / Board
	Raise profile with individual RSLs and Community Housing Cymru	Ongoing	PEO
	Reach out to Health Boards and Public Health Wales to support Network Events.	Q3	PEO