

Cymorth	Planning
Cynllunio	Aid
Cymru	Wales

Annual Report 2010 - 2011



Planning Aid Wales Annual Report April 2010 to March 2011

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Planning Aid Wales – working towards a fairer planning system

Website: www.planningaidwales.org.uk
Email advice: info@planningaidwales.org.uk
Advice Helpline: 02920 625 000
General enquiries: 02920 625 009

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Cover image: South Stack lighthouse, Anglesey

Foreword by the Chair of Planning Aid Wales



This has been an impressive year in the development of Planning Aid Wales.

In what are very difficult economic times, our services have gone from strength to strength, and we have managed to secure additional funding from the Welsh Government. This has happened while other planning aid services have faced severe cut backs to their operational services and funding. We are very thankful to the Welsh Government for their continued invaluable support.

I feel that Planning Aid Wales has been very successful in showing the value of our services and we look forward to progressing our work in a new era of Welsh Government.

I have been very pleased to welcome Sioned Pearce, our new Development and Training Officer, and I welcome the recruitment of a new Planning Assistant to support our Planning and Case Manager in his crucial work.

As a local authority planner I see first hand, every day, the call for independent and impartial planning advice. My colleagues and I feel very fortunate to be able to call on the services of, and collaborate with, Planning Aid Wales.

One of our biggest achievements this year has been the development and utilisation of our volunteer network. I am really pleased that they will be so well represented at our Annual General Meeting to provide an insight into some of the amazing work they have been doing.

We have, of course, continued to provide a much relied upon Helpline service, but I am really proud of some of the fantastic, more proactive, planning advice and services we have been able to provide this year. Particular highlights have included preparation of guidance on Access Statements and a sustained programme of planning training for community and town councillors, including preparation of a suite of distance learning materials.

My thanks go to the Planning Aid Wales staff team, my fellow directors and volunteers for all their hard work this year.

A handwritten signature in black ink that reads "Lucie Taylor". The signature is written in a cursive style.

Lucie Taylor

Chair of Planning Aid Wales

Casework



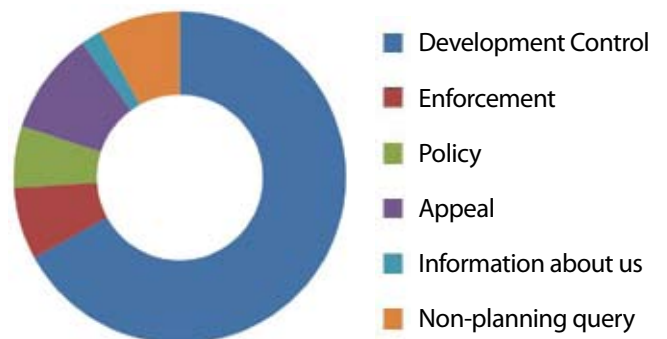
Victorian pleasure pier, Llandudno

Planning Aid Wales has continued to provide a high quality Helpline advice service with assistance from our network of qualified planning volunteers.

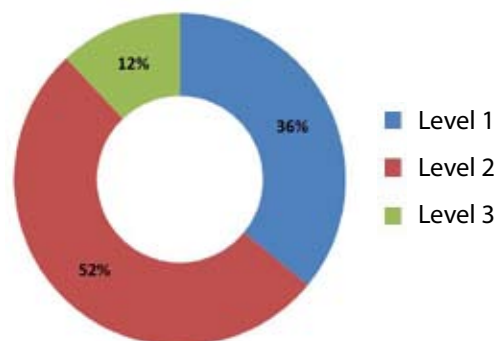
Between April 2010 and February 2011 we received almost four hundred requests for information, advice and assistance on a wide variety of planning matters. We also assisted 26 community groups with a combined total of 730 members.

We use eligibility criteria to make sure our limited resources are directed to those people who most need them. We are not able to help people who are likely to gain financially from a planning decision - these callers are referred on to a list of certified planning consultants.

The two diagrams opposite illustrate the eligibility of our clients over the past year (Level 3 clients are the most eligible) and the types of queries we received.



Type of query



Client eligibility

Some casework examples

The Planning Aid Wales Helpline offers information, advice and support on a wide variety of planning issues, including Local Development Plans, permitted development rights, planning applications, planning appeals and much more.

As examples, over the past year we have:

- *supported two families of Gypsies and Travellers in South East Wales.*
- *helped a community group in Swansea respond to a proposal for a new block of flats.*
- *advised a community council in Maesteg on how to make their comments on a proposed new equestrian centre focussed and effective.*
- *explained to Mrs X. in Rhondda Cynon Taf that there is no national rule for minimum separation distances between houses in new developments.*
- *provided information on the Section 106 process to Mr W. from Mold who had difficulty understanding an agreement on his application for a new dwelling.*
- *encouraged Ms K. to seek legal advice before mounting a High Court challenge over a village green issue in Cardiff.*
- *helped Ms H, who has dyslexia, to structure her comments on the Cardiff Local Development Plan.*
- *explained the committee decision making process to Mr J. from Gwynedd, who was concerned that his views would not be taken into account on a planning application.*

Our Helpline is a service valued by referral agencies and others, as illustrated by this comment from Angela Burns AM at the Sustainability Committee's Inquiry into planning, June 2010:

"I wish to place on record my thanks to Planning Aid Wales, because my constituency staff have contacted your organisation on a number of occasions about people who have been struggling and do not know which way to go. You and a rural housing enabler - if you can ever find one - are two very valuable commodities to have."

Casework volunteers

We have over forty casework volunteers giving up their time to help members of the public in Wales navigate through the planning process.

Why do caseworkers do it ?

John Bowers: *"I moved from development control to policy in 2006. Planning aid casework helps me keep up my knowledge of procedure. Casework with Welsh speakers helps me keep up my technical Welsh and my skills at explaining technical planning."*

Helen Ridgway: *"The town councillor who I assisted was not aware of Planning Aid Wales - the Planning Inspectorate directed her to us. She was extremely grateful for the advice that I provided which allowed her to understand the scope of what she was and was not able to address and hopefully gave her the tools, the confidence and unfortunately the 'language' to communicate with the planning department and Environment Agency. The whole case took less than two hours to resolve and gave me a challenge which I had not dealt with in my day job. Overall it was a very positive experience."*

Lucie Taylor: *"It has been great to help the people of the village of Bontgoch in Ceredigion. They are interested in a wind farm scheme that is to be considered by the Infrastructure Planning Committee so it has been an excellent opportunity for me to learn about all the new processes."*

Working with communities



Volunteer Hannah Machin assisting at Community Council training, Newport, January 2011

Planning Aid Wales aims to help local communities to understand and more effectively influence the Welsh planning system. Our objective is to build capacity and knowledge so that communities can help themselves. We focus particularly on encouraging marginalised communities to become more involved through outreach work, training and awareness-raising.

Over the past year, we have worked with a range of groups not traditionally involved in the planning system including Gypsies and Travellers, local Access Groups and very small businesses. We have also delivered a number of training and capacity building sessions for community and town councillors and community groups, and continued our work to

assist the Brecon Beacons National Park Authority engage its local communities in the later stages of Local Development Plan preparation.

Training materials for community and town councils

Following our pilot training programme for community and town councils in 2007/8, we have received further funding from the Welsh Government to produce a suite of distance learning materials which will build capacity at this lowest level of local government. The training materials have been piloted with very encouraging feedback and will be available for free download from our website soon.

Communities First areas

Planning Aid Wales aims to engage and support individuals and groups in deprived areas. We met with the Welsh Government's Communities First policy team in mid-2010 to discuss routes for engaging people in Communities First areas, particularly during LDP preparation. We have also worked to promote our services at Communities First events, on the support network website and in the co-ordinators' bulletin.

We have also worked with CwmNi, the Communities First partnership in Treherbert, to prepare a Big Lottery bid for community training on planning applications. While that bid was unsuccessful, the foundations for future bidding with CwmNi have now been laid.

We aim to continue making links with Communities First at a strategic programme level in order to publicise and promote our work.

Working with Access Groups

Over the past year, we have completed two projects which have strengthened our links with Access Groups across Wales.

First, we were commissioned by the Welsh Government to work with Access Group partners to prepare a guidance publication on the access element of Design and Access Statements. Published in February, the publication provides guidance on applying the principles of inclusive design so that new development will be accessible to as many people as possible.

Second, we were commissioned by Disability Wales to deliver a planning training module for a joint audience of Access Groups and planners as part of the

Way to Go project. The one-day course delivered in November 2010 in Newport gave a comprehensive introduction to the planning process, covering Local Development Plans, the planning applications process and Design and Access statements. The training was well received and we will be delivering more Way to Go training modules in summer 2011.

Community engagement review

Community Development Cymru and Planning Aid Wales were jointly commissioned by Pembrokeshire Coast National Park Authority to undertake a comprehensive review of community engagement activities in the park area.

We prepared a desktop assessment of the authority's main corporate policy documents and facilitated a focus group meeting of senior staff to probe their engagement intentions. A joint report was published in January 2011 and has been well received by the commissioning body.

Offering a bilingual service

We have adopted a second Welsh Language Scheme covering the period 2010-2013. The new scheme charts the action needed to provide all of our services fully bilingually.

Working with partners



National Planning Aid Conference, Cardiff, April 2010

Core funding

Planning Aid Wales is core funded by the Welsh Government and Royal Town Planning Institute Cymru. From April 2011, our annual grant from the Welsh Government will rise by £15,000 to £135,000. Core grant covers staffing, accommodation and other costs needed to deliver our advice and information services.

Planning Aid Wales works with a range of other partner organisations to increase our impact, to sustain our existing core funding, and to raise additional income through funded projects.

National Conference 2010

Planning Aid Wales hosted the 2010 National Planning Aid Conference in Cardiff on 29th and 30th April 2010. The conference brought together planning aid staff, volunteers and trustees with representatives from community groups from across the United Kingdom.

The conference included an address by Jane Davidson, Welsh Minister for Environment, Sustainability and Housing, and a series of popular workshops

covering a wide variety of topics. The conference focused on how the UK family of planning aid services are already engaging with communities, and how we can learn from others and do better in future. Special thanks are due to the team of Planning Aid Wales staff and volunteers who worked so hard to make the event a real success.

Partner organisations

Over the past year we have worked with a range of organisations at different levels of influence and across different geographical and subject areas.

Strategic partners

- Welsh Government
- Royal Town Planning Institute Cymru

Programme partners

- One Voice Wales
- Communities First

Project partners

- Brecon Beacons National Park Authority
- Disability Wales
- Community Development Cymru

Building our capacity



The Management Board

The Planning Aid Wales Management Board makes sure the organisation keeps to its charitable objectives and that finances are managed effectively.

The Board meets formally every three months, with trustee directors based in locations across Wales and drawn from different sectors including local government, consultancy and academia. One director is nominated by Royal Town Planning Institute Cymru. People serving as directors on the Management Board over the year are listed in Appendix 2.

Over the year, we said goodbye to one director, Kathryn Beard, and welcomed John Mattocks as a new director to the Board.

A robust strategy is in place for Board recruitment and renewal, and a comprehensive information and recruitment pack for people interested in joining is available at:

www.planningaidwales.org.uk/volunteering/board-recruitment

The staff team

Planning Aid Wales is led by a Chief Executive who is responsible to the Management Board for sustaining the organisation and managing its staff.

A Planner and Case Manager is responsible for the Helpline including referrals to volunteers and for developing the Wales-wide volunteer network.

In October 2010, we recruited a Development and Training Officer to develop our outreach work programme with local communities and co-ordinate our training activities.

A part-time Finance and Administration Officer supports the Chief Executive and other staff.

We are currently recruiting for a new post of Planning Assistant to take Helpline calls and increase the proportion of case referrals to volunteers.

Doing more with our volunteers

Volunteer recruitment

We have welcomed twenty new volunteers over the past year, giving us a network of almost one hundred committed volunteers. We rely on experienced planning volunteers to support our core casework and training services.

We also welcome community volunteers from non-planning backgrounds to assist with other activity areas such as outreach, events and marketing. We are always on the lookout for new volunteers, so if you are interested in volunteering your planning or community engagement skills, you can find out more here:

www.planningaidwales.org.uk/volunteering

Over the course of the year, we provided office placement opportunities for three graduate planners seeking employment experience in difficult market conditions. Whilst providing crucial support to the staff team, office volunteers Sarah Hall, Lorna Duggan and Angharad Hobbs gained work experience in a busy planning office and knowledge of both planning policy and development management issues. We are pleased that all three have gone on to secure permanent employment in the planning profession.

Volunteer experiences

We know from our volunteers that volunteering with Planning Aid Wales gives new and useful perspectives on public involvement in the planning process. Volunteers continue to report that the experience gained is invariably useful when applied back in the workplace.

Angharad Hobbs: *“Following the completion of my MSc at Cardiff University I strongly felt that I lacked practical planning*

experience. I was delighted to be offered an office volunteer placement with Planning Aid Wales for three months. During my placement I had the opportunity to learn new skills and keep up to speed with recent developments in both development control and planning policy. Planning Aid Wales plays a crucial role in helping members of the public to become widely involved within the planning system and I feel very proud to have been a part of it.”

Ste James: *“Planning Aid Wales work provides an insight to the planning decisions which I am involved with everyday in my own local planning authority, but from the public perspective. This perspective of planning and the decisions we make is extremely important since so much of what we do can be misconstrued and misunderstood, either because we have not explained ourselves in simple plain language or because we have not taken the time to provide explanations for our decisions.”*

“Volunteering is extremely valuable as it allows me, in my day job, to assess my own actions and to provide that explanation in the hope that the public will have a better understanding and can feel confident in contributing to the planning process. Regular and clear communication of the issues by a planning authority has to be seen as the basis for bringing transparency and clarity to an otherwise complex and easily misunderstood process.”

Volunteer activity

We maintain a detailed log of the time volunteers contribute to the various activities they undertake on behalf of Planning Aid Wales. Over the past year, our volunteers collectively gave more than six hundred hours to helping increase public understanding and involvement in planning, and a further three hundred hours was given by office placement volunteers to support the organisation.

Volunteer management

We have restructured case management procedures with the aim of offering more opportunities for volunteers to take on casework. We now have a dedicated team of over forty casework volunteers dealing with 70% of all cases arising from the Helpline. Our new Development and Training Officer has also begun to focus on building the capacity of our growing network of community volunteers.

Investing in Volunteers

Planning Aid Wales has been working over the past year to align its volunteer management processes with the requirements of the Investing in Volunteers standard. We registered for the scheme in March 2011 and aim to achieve accreditation by March 2012.

Departing volunteers

Many thanks and good luck to departing volunteers Marianne Auzanet, Steve Cranston, Rhian Brimble, Ken Richards, Kate Powell, Paul Slater, Mark Clayton Cottaray, Michael Hughes, Sebastian Loyn, Daphne Thomas, Robert Storr, Stephen Agyeman-Kuma, Victoria Phillips, Lucy Hill, Xi Zhang, Pedro Garcia, Mutahir Awan, Rachel Robertson and Huw Thomas.

Volunteer training and networking

Over the year we provided three evening events for new and existing volunteers. These events are designed to introduce new volunteers to our values, policies and practices and to give existing volunteers a chance to refresh their skills. In September 2010, Planning Aid Wales commissioned Participation Cymru to provide facilitation training for a team of eight volunteers interested in helping staff to deliver our planning training programme. The training focused on presentation skills, facilitation techniques

and methods for dealing with difficult audiences. The training was a success and members of the training team have begun to deliver live training events.

We are now working to provide a programme of focussed training for volunteers over the coming year, with an emphasis on community development and training skills. We will also continue to offer subsidies for volunteers to attend planning training events and courses provided by Royal Town Planning Institute Cymru.

Developing our training services

With a Development and Training Officer in place to co-ordinate existing and develop new training programmes, we are exploring possible options for funding future training activities. An adopted training strategy is guiding expansion of our training offer to March 2013, by which time we aim to be a respected provider of high quality planning training. The strategy identifies our main training targets as disadvantaged groups, community groups, planning professionals and key stakeholders.

Raising our profile

A marketing strategy is being implemented to help build our profile among five key target audiences. These are AMs and MPs, Welsh Government officials, local planning authorities, stakeholder organisations and disadvantaged communities.

Planning Aid Wales gave evidence at the opening session of the National Assembly for Wales Sustainability Committee's inquiry into planning in mid-2010. We submitted an issues paper before the inquiry and a supplementary evidence paper during its later stages; both can be accessed from: www.planningaidwales.org.uk/about-us/consultation-responses

Looking ahead



Over the previous year, with continued grant support from the Welsh Government and Royal Town Planning Institute Cymru, we have been able to develop existing work streams and develop into new areas of activity.

As well as providing an advice Helpline, we now also deliver planning training for an expanding range of audiences, publish advice leaflets and guides, assist local authorities with proactive community engagement work, work with partners to undertake project commissions, actively market our services to a range of target audiences, and respond to national policy consultations on behalf of users of the planning system.

Over the coming year, we see Planning Aid Wales ...

... taking an even more mainstream role in the Welsh planning system. We will continue to build the capacity of our staff team and volunteer network in accordance with a business plan for 2011 to 2014 which sets the strategy for growth.

... continuing to influence the development of Welsh planning policy by

responding to consultations and through representation on the Wales Planning Forum and other key groups.

... successfully lobbying Assembly Members for additional resources, using a short statement of our aims and ways of working to build a clearer understanding of what we do and the potential we offer for helping to build a fairer and more transparent planning system in Wales.

... engaging in proactive work with marginalised communities through innovative outreach partnerships, aiming to undertake exemplar work which can be replicated in other areas.

... marketing its services to those who most need them, aiming to increase the proportion of high eligibility callers to the Helpline.

... exploring funding options to develop a planning education programme for younger people.

... achieving Investing in Volunteers accreditation.

... volunteers, particularly community volunteers, being encouraged to contribute even more across all areas of our work, especially training.

Appendix 1: Financial information 2010/11

Statement of financial activities, year ended 31st March 2011

	Unrestricted Funds £	Restricted Funds £	Total 2011 £	Total 2010 £
Incoming resources				
Activities in furtherance of the charity's objects				
Grants received	7,000	120,000	127,000	109,808
Donations	128	-	128	145
Fundraising events	162	-	162	150
Sale of publications	-	-	-	162
Bank interest received	106	-	106	83
Other income	145	-	145	420
Fees receivable	3,804	2,897	6,701	47,463
Total incoming resources	11,345	122,897	134,242	158,231
Resources expended				
Direct charitable expenditure	-	142,552	142,552	132,046
Management and administration	1,942	-	1,942	2,247
Total resources expended	1,942	142,552	144,494	134,293
Net incoming resources for the period	9,403	(19,655)	(10,252)	23,938
Funds brought forward	39,826	30,234	70,060	46,122
Funds carried forward	49,229	10,579	59,808	70,060

Balance sheet as at 31st March 2011

	2011 £	2010 £
Fixed assets		
Tangible assets	1,053	682
Current assets		
Stocks	300	300
Debtors	2,661	5,018
Cash at bank	58,810	66,947
	61,771	72,265
Creditors: amounts falling due within one year	(3,016)	(2,887)
Net current assets	58,755	69,378
Total assets less current liabilities	59,808	70,060
	=====	=====
Funds		
Unrestricted	49,229	39,826
Restricted	10,579	30,234
Members' funds	59,808	70,060
	=====	=====

The above figures are taken from the 2010/11 final accounts, which are prepared by an independent qualified accountant. Full accounts are available on request.

The Planning Aid Wales Management Board oversees the financial management of the organisation with the aim of supporting and growing Planning Aid Wales on the basis of a sound financial footing. The Board has an adopted reserves policy designed to maintain a prudent level of reserves for continued operation, in accordance with Charity Commission guidelines.

The table refers to restricted and unrestricted funds. This distinguishes between funds which can only be spent on specific items normally associated with project funding, and those for which there is no constraint on their use.

Appendix 2: Directors and staff

The Management Board

Tony Humphreys, Chair to July 2010 (planner, retired)

Lucie Taylor, Chair from July 2010 (Newport City Council)

Gayle Wootton, Vice Chair from October 2010 (Welsh Government)

Owain Wyn, Treasurer (planning and regeneration consultant)

Peter Kingsbury, Chair of Staffing and Audit Committee (Cardiff Council)

Ian Horsburgh, Publicity Officer (planner, retired)

Allan Archer (planner, retired)

Kathryn Beard (Welsh Government) - **to June 2010**

Laura Dagless (Planning Aid Wales volunteer)

James Griffiths (Society of Local Council Clerks)

Neil Harris (Cardiff School of City and Regional Planning)

Katherine Hughes (community research and development consultant)

John Mattocks (planner, retired) - **from October 2010**

Kathleen Norton (planner, retired)

Chris Potts (RTPI Cymru nominee) - **from August 2010**

Anna Prescott (RTPI Cymru nominee) - **to July 2010**

The staff team

Elwyn Thomas, Chief Executive

James Davies, Planner and Case Manager

Marika Fusser, North Wales Development Worker - **to July 2010**

Maria Allen, Training Officer - **to July 2010**

Sioned Pearce, Development and Training Officer - **from November 2010**

Kay Sharman, Finance and Administration Officer