

Cymorth	Planning
Cynllunio	Aid
Cymru	Wales

Annual Report 2009 / 2010



Planning Aid Wales Annual Report April 2009 to March 2010

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Planning Aid Wales – Working towards a fairer planning system

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RTPI

mediation of space - making of place
cvd drefnu aofod - creu cynefin



Llywodraeth Cynulliad Cymru
Welsh Assembly Government

Chair's foreword



I warmly welcome you to this year's Planning Aid Wales Annual Report from the sun deck of MS Ventura as she cruises to La Coruna in northern Spain. As we cross the Bay of Biscay, renowned for its tempestuous waters, the sea is unusually calm and there are days ahead of plain sailing. This is somewhat reminiscent of the way things have been during my second year as Chair of Planning Aid Wales.

This year, once again, Planning Aid Wales has been extremely active with many important projects in the pipeline and events taking place. As I read through the draft version, I find it hard to believe that so much has been achieved, taking account of the resources available to Planning Aid Wales.

A large part of the success we have achieved this year is due to the dedication of the small staff team. I am deeply indebted to them for all their efforts and for making my role as Chair so easy and stress free. One of the things that makes being involved with Planning Aid Wales so appealing is the sheer diversity of work. Whether you are a volunteer, a director on the Management Board or a member of staff, there is always something going on which is likely to be of interest and whet the appetite.

During the year Planning Aid Wales continued to work proactively with communities as well as within the planning profession, such as the programme of engagement training for local authority planners which aimed to build understanding of the different needs of people who wish to be involved in planning issues.

Planning Aid Wales has also been represented on the steering group which oversaw the review of the planning application process in Wales, commissioned by Welsh Assembly Government to examine issues and concerns arising from the planning application process.

I am pleased to report that we continue to attract new volunteers and that casework is still at a reasonable level. My thanks to all the volunteers who gave up their time to work on cases throughout the year. Without their dedication and support, Planning Aid Wales would not be able to continue its valuable work with anything like its current efficiency.

We have continued to maintain close links with the Welsh Assembly Government and RTPI Cymru over the year and we remain grateful for their continuing support. While this year has seen the Planning Aid Wales Management Board reinvigorated by new members, there are still two vacancies so please do come forward if you are interested in becoming a trustee director. I extend a special thank you to my colleagues on the Board for their continued support and contributions throughout the year.

Sadly I have to end this year's foreword by reporting the departure from Planning Aid Wales of two members of staff, Marika Fusser and Maria Allen. Both, although employed on a part time basis, have been real assets to the organisation and they will be greatly missed. I wish them well for the future.

Tony Humphreys

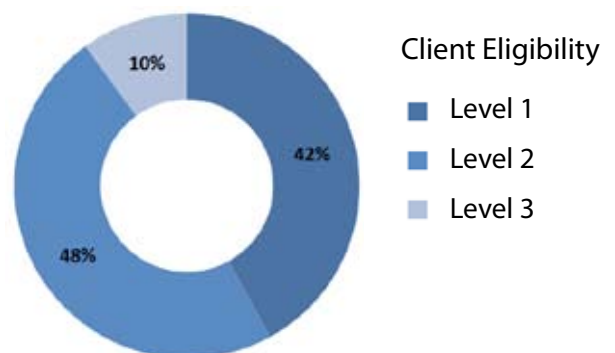
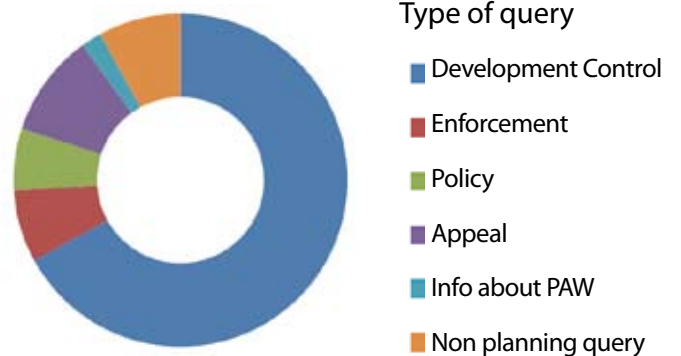
Chair of Planning Aid Wales

Casework



Planning Aid Wales continues to provide a high quality Helpline advice service, with help from qualified casework volunteers. Between April 2009 and March 2010 we received almost four hundred calls seeking information, advice and assistance on a wide range of planning matters. Of these, forty-five were from community groups, with a combined total of 320 members.

We use eligibility criteria (see Appendix 1) to make sure our limited resources are directed to those people who most need help. We do not 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 charts show the eligibility of Helpline clients over the past year, and the types of queries received:



Case study:

Support for Caerphilly residents

Over eighteen months, three volunteers - Katherine Hughes, Helen Ridgway and Davina Powell - have given over three hundred hours to helping the local community address complex planning issues relating to redevelopment of the Caerphilly Miners' Hospital site. The volunteer team has assisted in a variety of ways, including:

- Working with Assembly Member Jeff Cuthbert to develop a project management committee with local members and professional advisors.
- Speaking at local events to raise awareness of the opportunities and issues.
- Developing a partnership with United Welsh Housing Association, which hopes to develop affordable housing on the remainder of the site.
- Undertaking local surveys to identify local views and raise awareness.
- Securing funding from the Millennium Fund for marketing and the Key Fund for a feasibility study.
- Establishing a history project, which other members of the committee will develop.
- Preparing a business plan and action plans for the committee.
- Meeting with the relevant Minister, officials and council staff.
- Preparing representations to the Local Development Plan.
- Providing strategic planning advice to the committee.
- Attending committee meetings.
- Creating a website for the management committee to engage the community.
- Advising the management committee on community consultation.

Volunteer Katherine Hughes said: *"Being a Planning Aid Wales volunteer has helped to provide the initial link with the community and provided indemnity insurance for the volunteer team's planning-related activity. It has also helped to identify when the committee needed planning advice and raised awareness of Planning Aid to the wider community in Caerphilly. The committee is greatly indebted to Planning Aid Wales and is considering how it can mark its appreciation to its volunteers and such a worthwhile organisation."*

Case study:

Gypsy Traveller support

We were asked in early 2009 if we could help a traveller family appeal against a refusal of permission to retain their small site for caravans in Newport. Planning Aid Wales volunteers worked with the family to prepare for their appeal and also attended the Hearing, which resulted in a temporary personal permission for the family. The Inspector's report expressed concern about the council's lack of site provision, which helped another traveller family gain planning permission for their site soon afterwards. A further two families are currently receiving support: a planning application has been submitted for a site owned by travellers but without caravans on it, and another will soon follow for the retention of an existing site.

This work is difficult because travellers can experience poor living conditions, which causes poor health, and many have low levels of literacy. However, we have shown that close working with the planning authority can reduce conflict and saves the future cost of enforcement against unauthorised sites. Planning Aid Wales is currently exploring funding options for a dedicated worker to co-ordinate a support package for Traveller groups across a small number of Welsh authorities.

Working with communities



Planning Aid Wales aims to increase local community involvement in all aspects of the Welsh planning system. We encourage communities to engage more effectively through awareness-raising, training and education. The focus for much of our community outreach work is deprived, 'seldom heard' groups who have not traditionally had a role in planning.

Staff and volunteers work with a range of target groups aiming to build their capacity to extract local benefit from the planning system. Beneficiaries have included small farmers, very small businesses, black and ethnic minorities, Gypsies and Travellers, older people, disabled people, tenants and residents associations, Welsh culture groups and local development trusts.

Over the year, we worked with fifteen community groups, totalling over four hundred members, to address planning issues. We also delivered thirty-five separate training and capacity-building events for a combined total of over six hundred people.

Supporting community and town councils in the Brecon Beacons

Back in 2008, we were commissioned by Brecon Beacons National Park Authority to deliver a series of training and capacity-building events for all community and town councils in the national park area. The aim was to involve local people in developing 'broad brush' strategy for the Local Development Plan being prepared for the area.

Planning Aid Wales was again commissioned by the park authority in early 2010 to deliver a programme of half-day workshops to support community and town council participation during the later stages of Plan preparation, particularly during the forthcoming Deposit consultation and Examination.

Training materials for community and town councils

Following our innovative pilot training programme for town and community councillors in 2007/08, Planning Aid Wales received funding from Welsh Assembly Government to prepare a comprehensive suite of distance learning materials for people at this lowest level of Welsh government. Councillors can work through these materials on their own in groups, or with a tutor, or they can commission further face-to-face training.

The materials have been tested with the target audience at a series of training sessions over the past year, and then fine-tuned to reflect feedback. There has been a very encouraging response from participants. Dafydd Fryer of Melindwr Community Council said:

"We had an extremely valuable workshop with Planning Aid Wales. The training focused on how best to comment on planning applications, including drafting letters that will have an impact. The unanimous reaction of the council members, a mixture of settled crew and new people, was that the evening had been extremely interesting and useful. It will definitely be of benefit for the council to have further occasional training of this kind in the future."

The suite of distance learning training materials will be available for free download from our website soon, along with other relevant sources of information and links. Community and town councils can also continue to hire a Planning Aid Wales facilitator to deliver training at a discount rate.

Communities First areas

Planning Aid Wales aims particularly to support communities within Communities First regeneration areas. Over the year we continued to work with Communities First Bowydd and Rhiw in Blaenau Ffestiniog, Ffestiniog Town Council and other local partners to develop and raise funding for a comprehensive community engagement project. The project aims to identify and channel local community needs and aspirations into the emerging Local Development Plan for Gwynedd. We have also supported the Bro Ddyfi Communities First Partnership to build the capacity of local community and town councils and voluntary groups to contribute to the Local Development Plan for Powys.

Planning for community assets

Planning Aid Wales and the Conwy Rural Business and Community Assets project joined forces in September 2009 to help local groups and community councils in the rural wards of Conwy give disused properties a new lease of life. A training workshop for local groups and councillors considered how to go about developing community assets. Participants built their understanding of how planning impacts on emerging development projects and learnt how to make a planning application.

Guidance on Access Statements

In mid-2009, Planning Aid Wales was commissioned by Welsh Assembly Government to work with partners to produce a short, accessible guidance booklet on preparing good Access Statements. There are three audiences for the guidance: developers thinking of submitting a planning application; planning officers considering Access Statements with planning applications; and Access Groups wishing to comment on applications.

We have worked closely with Access Groups and other experts to draw up this guidance and collected feedback from stakeholders at a well-attended focus group session, at smaller informal meetings and through correspondence with individuals. The guide will be published in summer 2010, and available from Planning Aid Wales or to download from a range of websites.

Supporting Gypsies and Travellers

Along with continuing casework supporting individual Gypsy and Traveller groups, Planning Aid Wales has again helped develop national policy on the subject. In autumn 2009 we worked with the Welsh Assembly Government's Gypsy and Traveller Liaison Unit to assist at a series of regional consultation events on a draft Gypsy and Traveller Strategy for Wales. We facilitated stakeholder workshops on accommodation and planning, helping to develop ideas for achieving the strategy's planning objectives.

Review of the planning applications process in Wales

Planning Aid Wales has contributed to the review of the planning application process in Wales. We were represented on the steering group which oversaw the research study commissioned by Welsh Assembly Government to examine issues and concerns arising from the planning application process. We also contributed by giving the perspective of lay users of the system at focus group meetings, and by submitting a formal consultation response to research questions (see: <http://www.planningaidwales.org.uk/about-us/consultation-responses>).

Community engagement training for local authority planners

With funding from Welsh Assembly Government, Planning Aid Wales delivered

a Wales-wide programme of engagement training for local authority planning officers in June 2009. The training aimed to build understanding of the different needs of people who wish to be involved in planning issues. It stressed the need for clear language and transparency, and the benefits of building productive relationships with local communities. A core message was that effective community engagement creates a 'win-win' situation; it increases efficiency in the planning process, improves community relationships and raises public confidence in the system. A total of eighty two delegates from sixteen planning authorities in Wales attended the events. All five sessions were fully booked and feedback has been extremely positive.

Publications

Over the year, Planning Aid Wales published three updated guidance booklets for the general public: '*What to do when faced with a planning application*', '*Seeing the light: Planning and rights to light*' and '*A guide to planning enforcement*'. These are available free of charge from the Planning Aid Wales head office or can be downloaded from: <http://planningaidwales.org.uk/how-paw-can-help/information/publications>

Offering a bilingual service

We have now completed the third year of our first Welsh Language Scheme, which charts the action needed to provide our services fully bilingually. Over the past year we offered clients seeking advice the choice of discussing their case in either English or Welsh. All our publications, including the website, are available in both languages. We also offer bilingual training sessions. The Scheme has been reviewed by a working group of staff, volunteers and directors, and a new scheme will be adopted in summer 2010 for the next three years.

Building the organisation



The Management Board and staff team

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 3. They have freely given their time, energy, experience, contacts and skills to developing our work, contributing

enormously to the progress we have made.

Over the year, we said goodbye to one long-standing director, John Lambert, and welcomed three new people to the Board, James Griffiths, Laura Dagless and Gayle Wootton. We have a robust strategy in place for Board recruitment and renewal, and a comprehensive information and recruitment pack for people interested in joining is available at: <http://www.planningaidwales.org.uk/volunteering/board-recruitment>

The staff team

Planning Aid Wales is led by a Chief Executive, 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. A part-time Development Worker develops our outreach work programme with local communities and marginalised groups. An Administration and Finance Officer supports the Chief Executive and other staff.

In December 2009, we recruited a Training Officer to co-ordinate and develop our training activities. We are now investigating funding options for a graduate Planning Assistant, to take Helpline calls and increase the proportion of case referrals to volunteers.

Doing more with our volunteers

We rely on fully qualified and experienced volunteers to support our casework and core training services. Less experienced planners, students and volunteers from other backgrounds assist with a range of other activities such as training, facilitation, marketing and outreach work.

Our network of volunteers offers knowledge, energy and enthusiasm. It consists of experienced planners and those newer to the profession, students, and people with the skills needed to help communities engage with the planning process.

Volunteers tell us that the experience gives new and useful perspectives on public involvement in planning, which can usefully be applied back in the day job.

Planning Aid Wales has started work to develop all aspects of its volunteer network in compliance with the Investing in Volunteers standard, which we aim to achieve by 2012.

A full list of current volunteers is available at: <http://www.planningaidwales.org.uk/volunteers>

Some volunteer experiences

Helen Ridgway: *"The opportunity to volunteer for Planning Aid Wales allows me to work with a community group in a very different way to my role in a private planning consultancy. While the skills are transferable, voluntary work allows me to engage directly with enthusiastic members of the community."*

John Talbot: *"Planning Aid Wales is essential for me as a means of keeping in touch with practical planning issues. I no longer work as a planner, but do not wish to surrender my identity as a planner or end my membership of the RTPI. Planning Aid is something I have always done, beginning with my first ever student project thirty years ago and something I hope I am always associated with. For many, planning is something with bureaucrats on one side and sharks on the other. Planning Aid works because people are able to have a dialogue about their problems without feeling their interests are in any way compromised. In short, Planning Aid humanises planning."*

Volunteer activity

A detailed record of volunteer activity has been maintained since mid-2009. It shows that in the ten month period from July 2009 to March 2010, Planning Aid Wales volunteers gave almost seven hundred hours of their time to helping communities in Wales understand and participate in the planning process.

Welcome to new volunteers

Planning Aid Wales has welcomed twenty-seven new volunteers over the past year, bringing the total to ninety. We are always on the lookout for new volunteers, so if you have skills in planning, community engagement or other areas and want to make the planning system fairer, please visit www.planningaidwales.org.uk/volunteering to find out more.

Departing volunteers

Many thanks to departing volunteers Celia Chow, Patrick Moss, Mark Dakeyne, Clive Williams, Tracey Brooks, Robert Green, Michael Fowler, Peter Laxton, Emily Dawson, Gemma Hideng, Sonja Thompson, Mike Jones, Phil Mclean, Sarah Hall and Solomon Aniyam. We wish you the very best of luck for the future.

Volunteer training and networking

Planning Aid Wales volunteers are offered an ongoing programme of training and networking events. For example, volunteer evenings held every six months or so introduce new volunteers to our values, policies and practices, and keep established volunteers engaged with our work.

In partnership with Young Planners Cymru, two quiz nights were organised over the past year for volunteers, planner colleagues and young planners in Cardiff. Both were very successful, with around one hundred planners attending and raising £150 each for the two partners.

Volunteers can attend relevant training events and courses provided by RTPI Cymru at a discount rate or for free.

Developing our training services

Planning Aid Wales's capacity to deliver training has increased significantly following recruitment of a Training Officer in December 2009. This new role is responsible for developing new training projects and co-ordinating our existing training programmes for disadvantaged groups, community representatives and planning professionals. A training plan is in place to guide expansion of our training activities to March 2013, by when we aim to be a well-respected provider of high quality, independent planning training.

We have worked to increase our capacity to offer training programmes to a variety of

target audiences. To help with this we have been building the capacity of our volunteers to assist with training, which will allow us to develop our training services more proactively and help ensure the diversity of community voices are heard in planning.

Raising our profile

Assembly Minister Jane Davidson hosted the joint Planning Aid Wales / RTPI Cymru Planning Reception for Assembly Members and key stakeholders at the Senedd on 24th June 2009. The event was a great success in terms of raising our profile among key decision makers, with at least ten Assembly Members attending. We aim to organise another joint reception next year.

A marketing strategy has been prepared to help build our profile among five key target audiences. These are AMs and MPs, Welsh Assembly Government, local planning authorities, stakeholder organisations and disadvantaged communities.

Working with partners



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

Core funding

We are core funded by Welsh Assembly Government and RTPI Cymru. Annual grant from Welsh Assembly Government will rise from April 2010, from £100,000 currently to £120,000. Core grant covers staffing, accommodation and other costs needed to deliver our core advice and information services.

Project funding

We augment core funding by undertaking project commissions with a range of partner organisations and by delivering training. Project work and other fee paying activities are instrumental to developing our work and contribute to a more sustainable funding mix. Appendix 2 gives details of how financial resources were generated and expended by Planning Aid Wales over the financial year April 2009 to March 2010.

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 Assembly Government
- Planning Inspectorate
- Royal Town Planning Institute Cymru

Programme partners

- One Voice Wales
- Communities First

Project partners

- Brecon Beacons National Park Authority
- Planning Aid services in Scotland, England and London
- Access Groups, Disability Wales and access experts
- Organisations supporting Gypsies and Travellers
- Community Development Cymru

Looking ahead



Over this year, we have been able to develop new and exciting areas of work with continued grant support from Welsh Assembly Government and Royal Town Planning Institute Cymru. As well as the telephone advice Helpline, we now also deliver planning training for a range of audiences, publish advice leaflets and guides, assist local authorities with proactive community engagement work, and respond to national policy consultations on behalf of users of the planning system.

Looking ahead over the coming year...

A more mainstream role for Planning Aid

... Planning Aid services across the UK will take a more mainstream role in planning, supported by the 'new localism' political agenda. Planning Aid Wales will respond by continuing to build the capacity of our staff and volunteers. A business plan for 2010 to 2013 will set the strategy for growth.

... we will continue to influence the development of Welsh planning policy by responding to consultations, and through representation on the Wales Planning Forum and other key groups.

... we will lobby for additional resources in advance of Senedd elections in spring 2011.

Community outreach

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

... we will market our services to those who most need them, increasing the proportion of high eligibility Helpline callers.

Volunteers

... an increasing proportion of Helpline cases will be referred on to volunteers.

... volunteers will be encouraged to contribute even more across all areas of our work, especially training.

... the volunteer network will continue to grow, supported by a programme of training, induction and networking opportunities in locations across Wales.

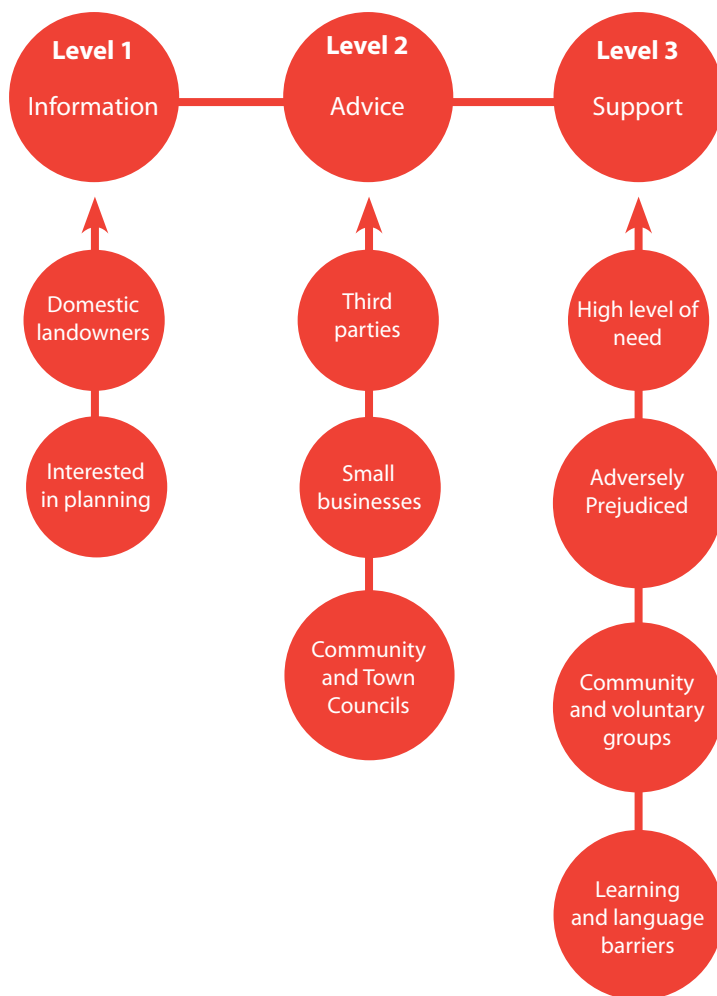
Publications

... we will publish user-friendly guidance on Access Statements and a comprehensive suite of distance learning materials for community and town councillors.

Training

... we will develop with partners a proposal to deliver a systematic training programme for local authority Members on planning committees.

Appendix 1: Eligibility criteria



Eligibility levels

Level 1 - Information

Domestic landowners who wish to carry out a development, and people who are unaware of the planning system and would like to participate.

Level 2 - Advice

Third parties wishing to express their views on a planning application or development plan, businesses with five employees or less, and community and town councils.

Level 3 - Support

Community and voluntary groups, people who may be prejudiced due to age, race, nationality, language, disability, gender, sexuality or social background, or anyone unable to engage with the planning system due to learning or language barriers.

Eligibility explained

Planning Aid Wales provides different levels of service to clients depending upon their circumstances. Our current eligibility criteria were adopted in January 2008, offering three levels of service to clients:

Information: Includes a description of the relevant area of the planning process, referral to relevant guidance literature or to a list of certified planning consultants.

Advice: Includes helping clients develop strategies and arguments to address planning issues and navigate the planning system.

Support: Includes representing clients, liaison with associated parties,

completion of correspondence and forms as appropriate, and helping prepare responses to planning applications.

Who we cannot help

Planning Aid Wales cannot help the following people:

- Planning consultants, architects, agents
- Medium to large commercial businesses.
- Individuals or groups who stand to make a profit from anything other than a minor householder development.
- Those with sufficient disposable income to engage a planning consultant.

Appendix 2: Financial information 2009/10

Statement of financial activities, year ended 31st March 2010

	Unrestricted Funds £	Restricted Funds £	Total 2010 £	Total 2009 £
Incoming resources				
Activities in furtherance of the charity's objects				
Grants received	8,000	101,808	109,808	123,690
Donations	145	-	145	40
Fundraising events	150	-	150	659
Sale of publications	162	-	162	735
Bank interest received	83	-	83	415
Other income	420	-	420	-
Fees receivable	2,094	45,369	47,463	12,904
Total incoming resources	11,054	147,177	158,231	138,443
Resources expended				
Direct charitable expenditure	-	132,046	132,046	134,382
Management and administration	2,247	-	2,247	3,480
Total resources expended	2,247	132,046	134,293	137,862
Net incoming resources for the period	8,807	15,131	23,938	581
Funds brought forward	31,019	15,103	46,122	45,541
Funds carried forward	39,826	30,234	70,060	46,122

Balance sheet as at 31st March 2010

	2010 £	2009 £
Fixed assets		
Tangible assets	682	494
Current assets		
Stocks	300	300
Debtors	5,018	8,461
Cash at bank	66,947	39,851
	72,265	48,612
Creditors: amounts falling due within one year	(2,887)	(2,984)
Net current assets	69,378	45,628
Total assets less current liabilities	70,060	46,122
	=====	=====
Funds		
Unrestricted	39,826	31,019
Restricted	30,234	15,103
Members' funds	70,060	46,122
	=====	=====

The above figures are taken from the 2009/10 draft accounts, which are subject to audit. Full accounts are available on request.

Planning Aid Wales enjoyed a surplus of income over expenditure of £23,938 in the 2009/10 year. This was a result of project income exceeding the budgeted figure by approximately £20,000. However, the grant from the Welsh Assembly Government remains crucial to Planning Aid Wales' continued operation. Expenditure was slightly lower than budget. As a consequence of the revenue surplus, the organisation's reserves rose to £72,060.

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 3: Directors and staff

The Management Board

Tony Humphreys, Chair (planner, retired)

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 (City and County of Swansea)

Kathryn Beard (Welsh Assembly Government)

Laura Dagless (Planning Aid Wales volunteer) - *from July 2009*

James Griffiths (Society of Local Council Clerks) - *from July 2009*

Neil Harris (Cardiff School of City and Regional Planning)

Katherine Hughes (community research and development consultant)

John Lambert (Environment Agency Wales) - *to July 2009*

Kathleen Norton (planner, retired)

Anna Prescott (RTPI Cymru nominee) - *from July 2009*

Lucie Taylor (Newport City Council)

Gayle Wootton (Environment Agency Wales) - *from February 2010*

The staff team

Elwyn Thomas, Chief Executive

James Davies, Planner and Case Manager

Marika Fusser, North and Mid Wales Development Worker

Kay Sharman, Finance and Administration Officer - *from April 2009*

Maria Allen, Training Officer - *from December 2009*