



**Planning Aid England**  
Engaging Communities in Planning

# Planning Aid England

# Volunteer Handbook

November 2019

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**Contact us:**  
020 7929 8338  
[Volunteers@planningaid.rtpi.org.uk](mailto:Volunteers@planningaid.rtpi.org.uk)  
[@PlanningAidEng](https://www.facebook.com/PlanningAidEng)  
[rtpi.org.uk/planning-aid/](http://rtpi.org.uk/planning-aid/)



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## 1 Welcome

Welcome to Planning Aid England (PAE). We are a small part of the RTPI with a big responsibility: to help people understand and engage with what may often seem a complex planning system, so that they can shape the places they care about. We can only achieve this through the hard work and dedication of our volunteers, so thank you for joining the team!

Our volunteers have been at the heart of everything we do for more than four decades. What we do and how we do it might have changed over time, but providing world-class planning advice and support for communities and individuals has remained our hallmark.

This Introduction to PAE accompanies the [RTPI Volunteer Handbook](#). Read together these documents should provide you with all the information you need when starting out. Please retain these documents so that you can refer to them as you carry out your volunteering activities.

Alongside these documents, the PAE team is always ready to help with any questions you may have.

I hope you find volunteering with us a rewarding experience.

Chris Pagdin

Manager, Planning Aid England



## 2 About Planning Aid England

### 2.1 What we do

Planning Aid England (PAE) is part of the Royal Town Planning Institute. We offer free, independent and professional advice on planning issues to empower individuals and communities to engage with the planning process and influence decisions that affect their local area. The PAE ethos is built on the principle that everyone should have access to the planning system regardless of their ability to pay.

Launched in 1973, PAE now enjoys coverage throughout England and separate charities exist to deliver Planning Aid services in [Scotland](#) and [Wales](#).

The PAE service is made up of 4 key work streams, the first two of which are directly supported by volunteers:

1. **PAE Direct:** This service provides a limited amount of free professional advice via a volunteer-led email [advice@planningaid.rtpi.org.uk](mailto:advice@planningaid.rtpi.org.uk) and through our [planning advice website](#). Chartered volunteers provide further in depth support (casework) to eligible clients. Eligibility is based on a specific set of [criteria](#).
2. **PAE Support:** A proactive approach to help communities in need engage with plans and planning decisions affecting their area, where possible in partnership with other organisations. This area of work centres on community planning and capacity building and offers opportunities to volunteers across all membership classes.
3. **PAE Consulting:** A programme of helping with bespoke community engagement exercises and bespoke training and workshops where these are consistent with PAE objectives.
4. **PAE Engagement:** A series of digital resources using a range of formats to promote wider engagement with PAE work programme outputs and learning through accessible, engaging discussion.



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The PAE service is coordinated by a team of 4 staff (3 of whom work part time and 1 full time) who work directly with over 200 volunteers, based across the nine RTPI English Regions, to develop and deliver the PAE service in regionally distinctive ways in order to address particular circumstances.

## 2.2 Planning Aid England staff

Chris Pagdin – PAE Manager



Chris joined the team as PAE Manager in June 2017 after over 30 years as a planner and senior manager spanning local and central government and consultancy. Prior to joining the RTPI he was Service Director: Planning and Transportation at Luton and before that Head of Planning and Development at Watford. Chris also spent 10 years in central government drafting national planning policy (for instance on PPG13 Planning and Transport and the circular on affordable housing) and good practice guidance including on vital and viable town centres; using density in planning and the use of travel plans in planning. Contact Chris at [Chis.pagdin@planningaid.rtpi.org.uk](mailto:Chis.pagdin@planningaid.rtpi.org.uk).

Brian Whiteley – PAE Advisor



Brian joined PAE in January 2014. He has over 39 years' experience as a planner in local government, working for a range of authorities primarily on planning policy and waste planning, and has led planning teams at LB Waltham Forest, LB Newham and LB Hillingdon. Contact Brian at [Brian.whiteley@planningaid.rtpi.org.uk](mailto:Brian.whiteley@planningaid.rtpi.org.uk)



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Holly McLaren – PAE Coordinator



Holly joined PAE in October 2015. She has worked in the charity sector for ten years, working on a range of volunteer-led initiatives. Prior to joining PAE, Holly was Education Services Manager at pfeg/Young Enterprise, and has previously been part of the education teams at the RTPI and the Royal Geographical Society. Holly holds a PhD in Cultural Geography and

retains an interest in questions of art, identity and place. Contact Holly at [Holly.mclaren@planningaid.rtpi.org.uk](mailto:Holly.mclaren@planningaid.rtpi.org.uk)

## 2.3 PAE Regional Representatives

Each RTPI Region has a Volunteer PAE Representative who is a Chartered Member of the RTPI and who sits on the Regional Activities Committee. PAE Regional Representatives take part in a teleconference with PAE staff every two months and also co-ordinate and chair regional PAE Task Group meetings (see section 2.4 for further information about Task Groups). As such, Regional Representatives are a key link between the PAE National Team and the RTPI Regions.

Contact details for current PAE Regional Representatives are listed in the Planning Aid England Volunteers' Area of the RTPI website, see <http://www.rtpi.org.uk/planning-aid/volunteering/volunteers-area-homepage/>.



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## 2.4 PAE Regional Task Groups

PAE Regional Task Groups steer regional PAE activity through identifying and developing suitable local outreach activities that PAE volunteers can get involved in – be this supporting a local planning authority with a Local Plan consultation or providing guidance to a neighbourhood plan group in a deprived area. Regional task groups are made up of approx. 6-10 members from across the region and meet approx. every two months by conference call or in person where feasible.

To find out more about joining your PAE Regional Task Group, please contact your Regional Representative, details for whom can be found at: <http://www.rtpi.org.uk/planning-aid/volunteering/volunteers-area-homepage/>. If your region does not have a PAE Representative currently in post, please contact a member of the PAE staff team.

## 3 Volunteer roles

Our volunteer roles are evolving constantly to reflect volunteer feedback, the needs of those we help, and changes in the planning system.

To ensure we offer the best service and for professional indemnity reasons, only Chartered members of the RTPI can give professional planning advice on behalf of PAE. However, there are many other interesting and fulfilling ways to help support PAE which either do not include giving specific professional planning advice, or involve providing advice under the supervision of a Chartered volunteer.

The current volunteer opportunities we offer fit into the following categories:

- Providing planning advice via email as part of our volunteer-led email advice service (MRTPI required)
- Casework (MRTPI required)
- Writing and / or reviewing online resources and guidance



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- Consultation and community engagement in deprived areas (e.g. supporting local plan consultations)
- Supporting neighbourhood / community planning activity in deprived areas

In addition to these categories, there may also be opportunity to oversee less experienced volunteers where opportunities arise (e.g. at a community consultation event).

### 3.1 Volunteer-led email advice service

PAE's email advice service offers a limited amount of free, general planning advice to the public who contact us via the 'submit a request form' on [www.planningaid.co.uk](http://www.planningaid.co.uk) or via [advice@planningaid.rtpi.org.uk](mailto:advice@planningaid.rtpi.org.uk). The advice service is manned by a panel of MRTPI volunteers, each of whom respond to enquiries on a rota basis – taking a morning, afternoon, or evening slot on a weekly basis. Volunteers interested in helping to deliver this service must initially complete a full day of training.

### 3.2 Casework

Casework volunteering involves providing planning advice on specific proposals or projects to individuals or groups deemed eligible for casework support. Advice can be provided over the phone, in writing, or in person, depending on the requirements of the case. Advice may be sought on a range of issues including making appeal applications, advising on enforcement issues and making effective representations on planning applications.

### 3.3 Writing and reviewing resources and guidance

This volunteering activity involves producing new or updating existing content for PAE's advice website [www.planningaid.co.uk](http://www.planningaid.co.uk) to ensure that it is kept up to date and reflects any changes to the planning system.

### 3.4 Consultation and community engagement

This volunteering activity involves providing a neutral facilitator role in support of local communities in deprived areas (defined as top 30% most deprived in England according to the Government's Index of Multiple Deprivation) to help them engage effectively with public





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consultations associated with Local Plans or large scale planning applications. It could also involve delivering capacity building workshops or specific community engagement exercises.

### 3.5 Supporting neighbourhood and community planning

This volunteer activity may involve delivering general training on neighbourhood planning to community groups and/or councillors. It could also involve providing bespoke support to a group working on a neighbourhood plan in an area of multiple deprivation - such as assisting with a community engagement activity or providing technical advice.

## 4 Good practice and guidelines

### 4.1 The RTPI Volunteering Code

The RTPI has put together a **Volunteering Code** which outlines the Institute's commitment to you and defines the behaviours that we expect from our volunteers. Please familiarise yourself with the Volunteering Code which can be found in part 3 (pages 8 – 11) of the main [RTPI Volunteer Handbook](#).

In addition to the Volunteering Code, all members of the Institute are bound by a [Code of Professional Conduct](#) setting out required standards of practice and ethics for Chartered and Non-chartered members.

### 4.2 Guiding principles when communicating on behalf of PAE

As a non-political organisation working with all communities, PAE has for over four decades avoided making partisan comment on any issues, particularly those relating to planning policy. We enjoy an enviable status of independence and impartiality. PAE is also required to remain neutral on the merits of specific projects and take all possible steps to avoid making comment which may provide commercial advantage or disadvantage to a third party. Our communications must at all times be professional, factual, impartial and should reflect PAE's values.



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PAE's primary function is to help and support people to engage in the planning system. All communications should reflect PAE's values in equal opportunities and diversity, and the tone of voice should be approachable and supportive while being clear, jargon-free and authoritative.

Furthermore, personal and PAE-related communications should be distinguished. It is important that you make clear your role in relationship to PAE / RTPI in all communications. e.g. you can start an email or letter with 'I'm writing to you in my role as a PAE volunteer'. When communicating in your capacity of a PAE volunteer it is important that the content reflects the views of the RTPI/ PAE. Personal opinions should not play a part in any of our external communications.

All external communications must adhere to these guiding principles. Where there is any doubt please refer in the first instance to a PAE staff member (see section 2.2).

If you are contacted by the media about a particular volunteer activity you should discuss this with PAE staff. The decision on whether to engage will be case by case depending on the context and the nature of what the journalist is asking.

Information on the RTPI [Social Media Policy](#) can be found in the PAE Volunteers' Area of the RPTI website, see <http://www.rtpi.org.uk/planning-aid/volunteering/volunteers-area-homepage/>.

### 4.3 PAE eligibility criteria

As our focus remains on supporting individuals and communities who do not traditionally engage in the planning system, we have a set of [eligibility criteria](#) that we use as a basis to focus our support and assistance.



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If through the course of your work you identify communities or individuals who you think may benefit from assistance by PAE please send us their details and we will assess whether we can help.

### **4.4 How much time is required**

There is no minimum or maximum level of time involved in volunteering for PAE as opportunities are diverse and flexible. Whilst some of our event-based opportunities require a particular time commitment, casework can vary from giving advice over the telephone, via email or a brief letter, to being more complex and perhaps requiring a site visit and assistance with appeal work.

The variety and unpredictable nature of volunteering means it is not always easy to estimate a set amount of time at the outset. Try to keep us informed of any major changes that may affect your ability to volunteer. We can be contacted if you feel an activity is becoming too demanding so support can be given (e.g. additional volunteers brought on board).

### **4.5 Advising outside your professional area of expertise**

You cannot advise clients on matters outside your professional area of expertise. The RTPI professional indemnity arrangement covers volunteers who are Chartered Members for most of the professional advice you give whilst prohibiting you from undertaking the following activities:

- drawing and detailed design work for anything other than illustrations necessary for the negotiation of planning permission i.e. not to be used to guide construction
- valuation work
- structural survey and site investigation work e.g. suitability of soil and availability of drainage and other utility services
- giving legal opinions.



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Furthermore, you should never give advice or information on a matter that you do not know about or do not understand. You should only give advice or information if you are sufficiently qualified or knowledgeable to do so. If you are unsure, tell the client that you do not have an answer and refer them back to PAE staff. Additional support may be available via another volunteer, perhaps one with knowledge in a specific area such as conservation, transport planning or planning enforcement.

### 4.6 Conflicts of interest

Please refer also to section 3.6 of the [RTPI Volunteer Handbook](#).

All volunteers should avoid situations that could give rise to a conflict between their personal or financial interests and their professional duty between one client and another. Volunteers should always make it clear that they are acting as a volunteer when speaking or writing to clients. Situations must be avoided that could give rise to any appearance, or reasonable suspicion, of conflict of interest. For example, if you are helping out at a community planning event you should not give out your own personal business cards to delegates, as this may make them unclear whether you are there to help them as a PAE volunteer or as a consultant/employee. If you feel that there is a possibility that a conflict of interest may arise or become apparent through a volunteer activity, discuss it with us.

### 4.7 PAE training opportunities

We will let you know if training for PAE volunteers is taking place in your Region. Volunteer training is organised by Regional Task Groups and free to attend. On occasion, expenses incurred to attend may be reimbursed by your Region according to the RTPI expenses policy (see section [2.3 of the RTPI Volunteer Handbook](#)). Please note that we do not provide or fund generic planning training, courses or conferences for volunteers. However:

- The [RTPI Regions](#) are an excellent source of low-cost or free events and training opportunities covering a wide variety of planning topics.
- [RTPI networks, groups and forums](#) offer an opportunity to keep up-to-date and build knowledge in a range of subject areas via e-bulletins, discussion forums and small events.



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- [RTPI Training](#) offers a wide selection of high quality masterclasses and briefings.

### 4.8 How to claim expenses

Reasonable out of pocket expenses incurred by volunteers appointed by PAE staff to support specific volunteer activities will be reimbursed. An expenses claim form which includes instructions on how to claim and what you can claim for can be found in the PAE Volunteers' Area of the RTPI website, see <http://www.rtpi.org.uk/planning-aid/volunteering/volunteers-area-homepage/>. The form should be completed and returned to a member of the PAE staff team, unless otherwise specified.

### 4.9 Insurance

#### **Public Liability Insurance (PLI)**

The nature of PLI is to defend or settle any proven claims by members of the public for death, illness, loss, injury or accident caused by the negligence of the organisation. Public Liability Insurance in general covers anybody other than employees who come into contact with the organisation (employees receive the same type of cover by way of compulsory Employers Liability Insurance). This includes volunteers, covering them against loss or injury caused by negligence of the organisation. It also protects for loss or damage to property caused through the negligence of someone acting with the authority of RTPI/PAE, which would include the actions of our volunteers.

Public liability cover also covers loss or injury caused by registered volunteers. If a registered volunteer is sued as an individual for damage caused to a third party, the RTPI's public liability insurance should cover them.

#### **Professional Indemnity Insurance (PII)**

PII covers the RTPI for claims arising from loss or injury caused by services provided negligently or without reasonable care by its employees or registered volunteers. Such



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loss might arise, for example, from misleading or inaccurate advice. An organisation can be sued for claims arising from incorrect advice or information even if it is given free or via a telephone helpline. Professional Indemnity Insurance also covers defamation, inadvertent breach of copyright, confidentiality and loss of documents.

Every professional person owes a legal duty to his or her client to exercise a reasonable degree of skill and care. Where this duty is breached and the client suffers loss, legal action may ensue. The duty applies even where planning advice is provided free of charge and irrespective of any disclaimer. PAE's registered volunteers are thus required to take the same degree of professional care and competence in their voluntary work as in any other work. The RTPI indemnifies Chartered and Legal Members for the professional advice they give to clients. Only Chartered Members volunteering for PAE are allowed to give professional advice to PAE clients.

Chartered Members volunteering for Planning Aid England are covered by the RTPI's PII while they remain Chartered Members. Planning Aid England uses the main RTPI database to ascertain the RTPI membership status of volunteers.

Volunteers must adhere to the guidelines set out in this document and report any matter to us that may affect the Institute's Professional Indemnity Insurance. Failure to comply with guidelines or notify the Institute may render this insurance cover invalid.

### **Making your vehicle insurers aware of your voluntary work**

If you use your own vehicle you should inform your insurer of your voluntary activities. To avoid confusion with a commercial use of the vehicle, you should make it clear that you will receive out-of-pocket expenses only.

#### **4.10 Casework**

As a volunteer who is a Chartered Member of the RTPI you have certain responsibilities when undertaking casework.



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## 4.10.1 Your role

- **Professional** - Although PAE is a free and independent service, clients are entitled to professional advice. Volunteers should make the same commitment to quality that they do with their professional clients.
- **Educator** - Volunteers have an educating role through providing ongoing explanation of the planning process as it relates to each client's individual case. Often clients may have little or no knowledge of the planning system and limited confidence. Volunteers should recognise this and avoid the use of complex terms and jargon wherever possible. PAE resources such as the [www.planningaid.co.uk](http://www.planningaid.co.uk) (see especially the '[jargon buster](#)') are available to help with this.
- **Enabler** - Volunteers are there to enable clients to undertake as much of the work as possible themselves with the benefit of professional advice and support.

## 4.10.2 Responsibilities

- Ensure that advice and support given is completely independent
- ensure that there is no conflict of interest between your voluntary and paid work
- never give or offer your professional service for financial or other material reward in your capacity as a volunteer
- help us direct PAE services to those who need it most with reference to our [eligibility criteria](#). If it becomes clear to you that a client is not eligible for assistance then, please let a member of PAE staff know so that they can refer them on accordingly – usually to the RTPI online [Directory of Planning Consultants](#).

## 4.10.3 Key stages

This [flowchart](#) (also available in PAE Volunteers' Area of website) sets out the procedure from when an enquirer first contacts us to seeking feedback at the end of the case.

### Volunteer checklist for handling casework

#### Step 1: We allocate the case to the volunteer





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Things to think about: do you understand your role in giving advice? Have you considered the time that you have available to undertake the case and have you shared this with us? Are you sure you will be able to provide assistance within the time required? Have you received a [link](#) to the following documents?

- an expense claim form
- casework volunteer feedback form

**Action:** If you have any doubts or remaining questions regarding the above issues contact the PAE staff member who asked you to take on the case.

### **Step 2: Contact the client**

Contact the client within two working days of receiving the case and regularly throughout the case. Always introduce yourself to the client as a volunteer for PAE. Make clear as far as you can the scope and level of advice and time you can give. Inform them that you have received basic details from the service and explain that your role is one of enabling rather than advocacy. We advise that you do not give out personal phone numbers to clients. If making a call to a client's home or work press 141 prior to dialling in order to withhold personal telephone information.

### **Step 3: Dealing with clients**

It is important that all PAE volunteers recognise any special needs that clients may have. It is quite likely that clients will have little or no knowledge of planning and limited confidence.

**Action:** Avoid the use of jargon.

The clients we serve are from diverse backgrounds and communication may be a challenge. Be sensitive to the religious and cultural beliefs of the client.

**Action:** If you are finding communication with the client problematic then contact us as we may be able to arrange some assistance.





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You may have clients who are difficult to deal with, e.g. discourteous, unreliable, or who place heavy burdens on your time. You may also encounter clients who are racist, e.g. who make racist objections to developments.

**Action:** If this happens then contact us to discuss how to proceed.

### **Step 4: Establish nature of the enquiry**

If required, ask the client to outline the case and seek to establish the precise assistance sought. Establish the planning issues from the non-planning issues. Only provide information which you are professionally qualified to give as a planner. If possible or appropriate, signpost the client to alternative advice sources e.g. [Citizens Advice](#), [Royal Institute of Chartered Surveyors](#).

Establish and consider the source of the information relating to the issues. Has the client viewed plans or proposals or sourced the information from another neighbour? Does the client require more basic information before more assistance can be given?

### **Step 5: Gathering further information on the client and their enquiry**

Are you planning on meeting the client or carrying out a site visit?

**Action:** If you are intending to meet the client or carry out a site visit then familiarise yourself with section 4.2 in RTPI Volunteer Handbook on health and safety.

Do you need some help to progress the case? We may be able to help with general and specialist information or arrange assistance and support from another volunteer.

**Action:** If you need help to progress the case then contact us.

### **Step 6: Is this an eligible Planning Aid England case?**

Do you think that the client may not be eligible?



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**Action:** At any time during the handling of the case if you do not think that the client is eligible for Planning Aid England then please get in touch with the PAE staff member who appointed you to the case.

## Step 7: Keeping a record

In order to keep a record of the progress of the case you will be asked to complete:

- an expense claim form (if applicable)
- a casework volunteer feedback form

available in the PAE Volunteers' Area of the RPTI website <http://www.rpti.org.uk/planning-aid/volunteering/volunteers-area-homepage/>.

If you are giving advice by email then you should state clearly at the outset that you are a Planning Aid England Volunteer and provide a link to the [PAE website](#).

**Action 1:** Use the documents provided to process details of the case.

**Action 2:** Return all documents to us when the case is complete. If the case is taking a long time to complete, it will be necessary to provide us with regular updates and interim information.

## 4.11 Other relevant policies and procedures

In addition to the above, part 4 of the RTPI Volunteer Handbook includes information on: equality, diversity, and inclusion, health and safety, insurance and data protection. Please ensure you read this section carefully.



## 5 Getting involved: what happens next?

### 5.1 Keeping up-to-date with PAE activities

Once you are registered as a PAE volunteer, you will be kept updated on what is happening in your area.

There are a number of ways that you will be informed of PAE activities.

- You will be contacted directly by PAE staff when a suitable volunteer opportunity arises (based on your specialist skills, knowledge and interests as well as where you live).
- The volunteers' area on our website contains important information including the notes of the monthly tele-conferences with PAE staff and Volunteer Representatives in the regions - see <http://www.rtpi.org.uk/planning-aid/volunteering/volunteers-area-homepage/>.
- Articles and updates on PAE in your regional newsletter and e-bulletin – keep an eye out for the latest stories and news.
- You can also follow us on twitter: @PlanningAidEng

In addition to PAE keeping you informed of volunteering opportunities you can also help us to identify communities and individuals who you think may benefit from our assistance. If you identify groups or cases that you think are eligible send us their details and we will assess whether we can help.

You can also help us to raise the profile of PAE and the support and services in your day to day work and activities by informing colleagues, friends, neighbours and users of your service about PAE. Word of mouth is a very powerful resource!



## 5.2 Updating the information we have about you

When you registered you told us about your knowledge and skills, the areas you'd like to volunteer in and what activities you'd like to get involved in. If these change, please [contact us](#) so we can update our records.

Please also [contact us](#) if you want to stop volunteering.

Approximately every two years we carry out a volunteer review where we contact all volunteers to get an up-to-date picture of your skills and interests and what you'd like to do.

Please note: your RTPI membership must be current in order for you to volunteer with PAE. If you cease to be a member of the RTPI, your PAE volunteer record will also be closed.

## 5.3 Feedback

Your feedback is very welcome! If you have any feedback regarding volunteering with PAE, please contact a member of the PAE Team.

# 6 Useful resources

## 6.1 Sample forms

All the volunteer forms mentioned in this document are also available in the volunteers' area of the PAE webpages: <http://www.rtpi.org.uk/planning-aid/volunteering/volunteers-area-homepage/>.

## 6.2 Useful websites for information and guidance to assist you in your role as a volunteer

- [Planning Aid England web pages](#): contains further information and advice on the services and support we provide and volunteering for PAE.
- [Volunteers' area of the PAE web pages](#): contains minutes of the monthly tele-conferences with the PAE Regional Representatives, contact information for your



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Regional Representative, relevant documents and forms and a discussion forum. It also includes a directory of alternative sources of support and advice.

- [www.planningaid.co.uk](http://www.planningaid.co.uk): our advice-focused website which offers answers to questions people often ask about planning.
- [Neighbourhood Planning](#): contains information on neighbourhood planning including the latest news, resources and case studies and information about Government grants for neighbourhood planning.
- [Planning Portal](#): The national home of planning and building regulations information and the national planning application service.

Planning Aid England is part of the Royal Town Planning Institute (RTPI). The RTPI is a registered charity in England 262865 and Scotland SCO37841. Registered address: RTPI, 41 Botolph Lane, London EC3R 8DL.