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Board of Trustees

Planning Aid England (PAE) Update: second quarter 2021

Report from the Director, Wales, Northern Ireland and Planning Aid England

FOR INFORMATION

Board is asked to note the work of PAE during the second quarter (to May) of 2021.

1. Summary

Key points for PAE during the second quarter of 2021 are:

- PAE have adapted its mode of operation to cope with the COVID lockdown. Luckily several elements of our work programme continue as normal, including the e-mail advice service, our dedicated planning advice website and we are working with our volunteers to deliver casework and other activities virtually;

- the PAE email advice service received a total of 432 requests for support and advice between 1st March and 30th April 2021 and averaged a satisfaction rating by service users of 86%;

- PAE received 15,436 hits on its advice and guidance website: www.planningaid.co.uk between 1st March and 30th April 2021;

- PAE received 6 pieces of casework between 1st March and 30th April 2021; with advice and support being delivered virtually;

- The second quarterly virtual volunteer meeting of 2021 took place on 20th April which amongst other things allowed us to co-design the approach on the PAE Support project;

- Following the successful pilot in relation to Blackburn with Darwen's (Reg 18) Local Plan consultation in February we have contacted a total of 19 local planning authorities to discuss the potential for collaboration as part of the PAE Support project. Some follow up discussions have taken place with some of these councils but as yet no firm activities have yet been agreed;

- An online RTPI Learn resource on the topic of planning and community engagement, postponed from 2020, is currently being redrafted to reflect the changing landscape with regard to the use of digital technology for community engagement and will be finalised in Q2 2021, with a launch scheduled thereafter and in liaison with CEPD;

- The PAE manager completed a search exercise to produce a short-list to be interviewed for the role of independent chair of the community engagement forum for the A358 NSIP project; and

- PAE currently has a total of 255 volunteers, 156 (61%) of whom are Chartered.

2. Context

PAE staff and volunteers are delivering the work programme agreed by the Board in September 2017 comprising three work streams:

- **PAE Direct**: to continue providing planning advice and guidance to the public including e-mail advice, individual casework and web-based advice, with the emphasis on expanding the range of activities which can be undertaken by PAE chartered volunteers;
- **PAE Support**: to work with regional PAE task groups and local authorities, to devise and deliver a pro-active approach to helping communities in need engage with the planning system. This is the most challenging element of our work – and much of this has been affected by COVID; and
- **PAE Consulting**: to include helping with bespoke community engagement activity, training and workshops where these are consistent with RTPI/PAE objectives and the capacity of the service. This has been delivered virtually since March 2020.

In line with strategic priorities, the 2019 service plan included an additional work stream:

- **PAE Engagement**: - to use a range of formats (e.g. podcasts, videos, online tools, and face-to-face training) to promote wider engagement with PAE work programme outputs and learning, delivered in close collaboration with other teams across the RTPI. Learning materials produced via this work stream will hold relevance for PAE volunteers and members of the public, as well planners more generally, politicians and decision makers.

All of the PAE work programme is consistent with the RTPI Corporate Strategy and many of our activities have considerable potential to enhance delivery of key projects by: raising the profile of planning; increasing its reach to new parts of the community and increasing the diversity of new members.

We are undertaking a light touch review of PAE during 2021 which will focus in particular on how to deliver more projects under the PAE Support work stream and how we can ensure the delivery of any future consulting work can be done in a way which minimises impact on other elements of our work programme.

3. Review of PAE Work Programme

3.1 PAE Direct

The table below shows the activity during 2021 on the e-mail advice service and our website:

2021	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**June**	
Requests to e-mail advice service	154	178	243	189			
PAE website hits	7,906	8,732	8,693	6,743			
	July	**Aug**	**Sept**	**Oct**	**Nov**	**Dec**	**Total so far**
Requests to e-mail advice service							764
PAE website hits							32,074

E-mail Advice Service

A panel of 12 chartered PAE volunteers continue to operate the PAE advice service effectively, each spending up to 2.5 hours a week answering general planning enquires by e-mail from their own home or work computers during pre-arranged time slots. The panel responded to a total of 432 requests for support and advice between 1st March and 30th April 2021 and averaged a satisfaction rating by service users during this period of 86%. This brings the total e-mails handled by the panel during 2021 to 764.

PAE Web pages

Another volunteer panel, comprising 20 chartered members from across the country, review and update the range of planning advice covered on the Planning Aid website. This work is carried out to ensure that the website provides up-to-date and comprehensive information including on guidance and legislation which is tailored to those with little or no knowledge of the planning system. So far in 2021, there has been a total of 32,074 hits as of 30th April.

Podcasts

A member of PAE staff has prepared a series of "how to…." audio recordings on themes which we often receive questions about, including how to present your case at planning committee (aimed at objectors/supporters to a scheme); advice for elected members sitting on planning committee, advice on writing representations including advice about 'material considerations'. These will shortly be available on the Planning Aid England website, and it is hoped that an audio recording might appeal to those who for whatever reason have difficulties engaging with written formats.

PAE Casework

PAE has received 6 pieces of casework between 1st March and 30th April (5 since the last Board report) – summarised as follows:

- A group of residents are seeking help in objecting to a planning application for new housing opposite their block of sheltered housing for elderly/vulnerable people. Our volunteer is assisting in their objection and advising on procedure in advance of the application being considered by planning committee;

- The Mucknall Abbey community are asking for our advice to respond to the latest consultation stage of the South Worcestershire Development Plan Review. The Abbey intends reviewing and commenting on the Sustainability Appraisal, and our volunteer is helping them draft a response;

- Support for an elderly resident in south Warwickshire who was involved some years ago in an application and appeal regarding his proposal to provide an improved home at his address just outside the main village. Our volunteer is providing a review of the case history and advising on whether there are any further steps which the resident might take to revive the application;

- Advising a Housing Action Group in Perry Barr, Birmingham following the introduction of an Article 4 direction prohibiting conversion from C3 to C4 small HMO. Our volunteer is advising the group on the planning implications of this and responding to their questions on policy and procedures; and

- Advising a group of residents in Stoke-on-Trent on how to best to go about making representations with regard to a planning application for 57 residential properties (two-storey and four-storey apartment buildings) on a site adjacent to their properties. The group are supportive of the housing development but have concerns with regard to loss of privacy and light.

Neighbourhood Planning: next steps

PAE staff and volunteer members have recently been involved in a group helping researchers at Lancaster University explore the future of neighbourhood planning. Primarily, this involved their taking part in a half-day workshop jointly organised by the University with the Campaign for the Preservation of Rural England on 12th March. The workshop was aimed at helping the University researchers with compiling a set of representations. These were finalised and submitted to the MHCLG in April "…to inform Government thinking on the role and function of (neighbourhood planning) in a reformed system...".

Points which came up in discussion at the workshop reflected lessons from PAE's involvement with Neighbourhood Development Plan (NDP) preparation, initially through the Supporting Communities in Neighbourhood Planning programme and later via its Advice Service. The University focussed its paper around six main themes:

- Extending participation in plan-making;
- Scope of NDPs – what should be in them;
- What their status should be;
- Their relationship to the wider planning system;
- Process – how to make plans more fully representative of their communities; and
- Resourcing and supporting plan preparation.

PAE staff can provide full details of the final paper compiled by the University.

3.2 PAE Support

Quarterly virtual volunteer meeting

As previously reported we have set up a quarterly virtual volunteer meeting with a cross section of our key volunteers attending, including representatives from the e-mail and website panels, the task groups, and key casework volunteers. These meetings serve as a replacement for the annual volunteer event and also the bimonthly PAE Regional Representatives meetings and are proving an effective way to discuss a wide range of issues including potential service improvements across the range of our activities and also as a forum for co-designing new projects.

On the 20th April we held our third virtual volunteer meeting which was well received by volunteers. A particular focus of this meeting was to discuss ideas around design and implementation of pilot projects under the PAE Support Project and also ideas for new virtual events. We also had a fruitful discussion about potential ideas for the light touch review of PAE taking place during 2021.

PAE Support Project

We have been looking to set up the PAE Support Project designed primarily to enable volunteers to act in a "neutral facilitator" support role on planning activities taking place in our most deprived parts of the country. As previously reported progress on this project was affected in 2020 by both higher than expected amounts of consultancy work and also by the COVID lockdown preventing face to face activities from taking place.

Having gained considerable experience in delivering virtual workshop sessions as part of our consulting work we held several discussions with our key volunteers about the potential to redesign the PAE Support Project so that it can be delivered in a virtual format for the time being. So far this year we have undertaken a pilot project as set out below and are also contacting local authorities with an aim to expand this project.

Blackburn with Darwen Local Plan - Regulation 18 public consultation

The first pilot took place in February when PAE staff worked with volunteers from the North West Region to deliver two virtual discussion sessions as part of the Blackburn with Darwen Local Plan (Regulation 18) public consultation.

PAE staff acted as technical hosts to allow each session to take place and worked in liaison with the council to produce a list of people and organisations to invite who might otherwise be less likely to take part in the planning process. Staff also organised the booking process for attendees and helped recruit PAE volunteers to act as panel members. In this case volunteers were drawn from both within the North West Region and from elsewhere in the country. In preparation for these events staff ensured volunteers and attendees were aware of a web presentation on the draft Plan prepared as part of the consultation by Council officers, which explained the Plan's strategy and content.

The two virtual discussion sessions which took place were designed to be held for up to 12 invited attendees from local community groups and organisations. A PAE volunteer chaired each session and together with two other volunteers on the panel answered questions on aspects of the draft Local Plan and how to make effective representations. Each session comprised a different set of volunteers.

Each two hour session started with a short explanation on the underlying context and strategy in the draft Plan from a lead officer at the Council, who then left the meeting to allow independent discussion about making representations on the Plan's policies and proposals.

It was considered important that one of the volunteer panel should be a junior, non-chartered planner who would subsequently provide a written note of each session. This would cover the range of themes discussed and points raised, without attributing comments to attendees. This note was subsequently agreed with the panel Chair in each case and then provided as feedback on the project, both to the individual attendees and to the local planning authority. In this case the lead officer from the council made clear that the comments would not be logged as formal representations but that details of each workshop and the points arising would be included in the Consultation Statement produced after the close of the public consultation.

Planning Officers at Blackburn with Darwen Borough Council have confirmed that they were very grateful to have had this support as part of their consultation and commented: "the PAE support offer provided organisations and individuals with an excellent opportunity to discuss their concerns about the proposals in the Local Plan with independent planning advisors. The workshop events organised and facilitated by the PAE volunteers were run very professionally and they complemented other consultation activity being undertaken by the Council very well".

Next steps on the PAE Support Project

In the 6 weeks since the successful pilot project we have contacted a total of 19 local planning authorities with particularly high levels of deprivation with the aim of starting a dialogue about potential collaboration. To date about half a dozen have responded and some initial follow up discussions have taken place with a couple of authorities (Birmingham and Leicester) but as yet no concrete proposals have come forward.

Rather than contacting several more authorities with a general offer of support we will endeavour to have further dialogue with the initial set of councils. Ideally we hope to get in an on-going collaboration with about 5 or 6 councils preferably spread across the country so that we can establish relations and a degree of trust with communities in these authorities who would welcome PAE acting as independent facilitators on successive planning consultations.

Regional update – events and training

- 4th March - A volunteer from the NW delivered a virtual talk about their career path and volunteering for Planning Aid England to students from across RTPI accredited programmes; and

- 16th March – The SW PAE Task Group successfully delivered a discussion-led RTPI webinar that explored the implications of the White Paper on community engagement in planning, considering the opportunities and challenges it may bring.

3.3 PAE Consulting

PAE is in the (possibly unique) position of being able to act as "neutral facilitator" in support of local communities engaging with major projects which has resulted in a number of commissions. During 2020 we did 3 major support projects, 2 on Sizewell C and 1 on Bradwell B, which meant that the team were delivering consultancy support projects more or less back to back from March to the end of December.

Since completing the Sizewell C support project in late December there have not been any further commissions of this nature which has allowed the team to concentrate on other areas of the work programme.

There have been some interest from parish and town councils near to Sizewell C about PAE providing further support during the upcoming Examination in Public but as yet this hasn't resulted in a commission. In this context it is also hard to see how PAE could become involved in the supporting councillors during the EIP process without it looking very much like advocacy for a particular party in the planning process – which would be against PAE's approach on consulting to date.

NSIP search exercises

The Planning Aid England Manager completed a commission in March to produce a short-list of suitable candidates to be interviewed for the role of independent chair of the community engagement forum for the A358 NSIP project. Four very experienced RTPI members were put forward for that selection process.

3.4 PAE Engagement

PAE and CEPD joint training initiative

In 2020 PAE worked with Careers Education and Professional Development (CEPD) to deliver a new co-branded training offer on the topic of planning and community engagement, the outputs of which included a RTPI masterclass on this theme and a new RTPI Learn resource. This Masterclass will run again in June 2021 with funded places being made available for up to 10 PAE volunteers.

Completion and launch of the RTPI Learn resource (two online modules) on planning and community engagement was delayed in 2020 because of other work commitments. However this delay has offered us the opportunity to redraft the material to reflect the changing landscape with regard to the use of digital technology for community engagement and how to make this as inclusive as possible. An external specialist engagement consultant is currently finalising these modules which will be ready in Q2 2021, with a launch scheduled thereafter and in liaison with CEPD.

4. Recommendation

Board is asked to note the work of PAE during the second quarter of 2021.

5. Health and Safety Implications

There are no specific health and safety implications arising from PAE's work programme. PAE staff are working from home and organise activities for volunteers who are also working from home.

6. Equality and Diversity Implications

Some PAE services, particularly casework, are available to those meeting established criteria. Priority is given to enabling the participation of communities within deprived areas in the planning process, driven through regional engagement and outreach activity and supported where available by PAE's commercial work. Our PAE Support project objectives in particular are aimed at engaging groups and individuals who may not usually get involved in the planning process and in this way we hope to both increase the diversity of our clients but also to increase the diversity of our volunteers.

One of the potential negative implications of doing activities virtually is that this may exclude some groups and individuals who for whatever reason do not use the internet. We will seek opportunities where they present themselves to help mitigate this issue but once the public health situation has returned to normal it does point to the need to re-establish some face-to-face activity in order to try and reach people who do not use the internet.

7. Resource Implications

The work programme agreed at the Board meeting in September 2017 aims to make the most effective use of the existing modest PAE staff resources which equates to 2.5 FTEs. The team now comprises one full time and three part time members of staff. One part-time planning advisor post was successfully filled in March 2020 meaning that the team is currently at full strength.

The results of a light touch review of PAE will be undertaken during 2021 which will consider, amongst other things, how we can ensure the delivery of future consulting work in a way which minimises impact on other elements of our work programme and how we make the most of our PAE support project.

8. Governance and Compliance Implications

The work of PAE applies solely to England, with those members affiliated to English Regions contributing as volunteers. In delivering our work programme we follow data protection best practice. There are no legal implications of our work programme.

9. Communications Implications

Much PAE work is undertaken in partnership with our volunteers and there is frequent communication with this group of members about various elements of work and individual projects. This includes a periodic newsletter to our volunteers as a way to keep in contact and seek support and input on individual projects. PAE also has a dedicated advice and guidance website: www.planningaid.co.uk which received over 100,000 hits during 2020. In addition, the availability of PAE services continues to be promoted through the Institute's website, The Planner and social media.

10. Corporate Strategy – Climate Action

Some PAE activity is designed to be delivered virtually – such as the e-mail advice service and maintaining the information on our website – all of which generates virtually no CO_2 emissions. In addition from March 2020 all other PAE activity has been delivered virtually which has significantly reduced the CO_2 emissions which would have been associated with travelling to any face-to-ace activities.

Looking forward and once the public health situation is back to normal we expect that a considerable proportion of our activity will continue to be delivered virtually as this approach has been shown to offer an effective way to engage volunteers in meaningful activity. However as mentioned above in the equality and diversity section there is a case for holding some face-to-face activities in order to encourage and enable people who do not use the internet to engage in the planning process.

11. Corporate Strategy – GROWPLAN

Many members find undertaking volunteer PAE activity rewarding and so delivering and improving PAE's work programme is an important way to retain existing and attract new members. Our aim is to devise a wide range of interesting activity for volunteers to undertake and by working to increase both the reach and variety of activities we aim to bring a wider range of people into contact with both the planning system but also the work of our volunteer members.

In particular our casework support and our PAE Support project is designed to generate activity in deprived parts of the country to help and support people and groups who traditionally have had little interaction with the planning process. If this is successful it will help to increase both the awareness of the Institute and potentially increase the diversity of people interested in becoming planners. In addition developing short videos of some of our interesting support projects and casework will help bring this activity to a wider audience.

12. Corporate Strategy – Digital Transformation

Even before the COVID lockdown much of PAE's work was delivered virtually (via e-mail and through website advice) and since March 2020 all of our activity has been delivered in this way. PAE has a dedicated platform for delivering virtual workshops and meetings and we expect to continue to deliver a significant proportion of our work in this way once the public health situation has returned to normal.