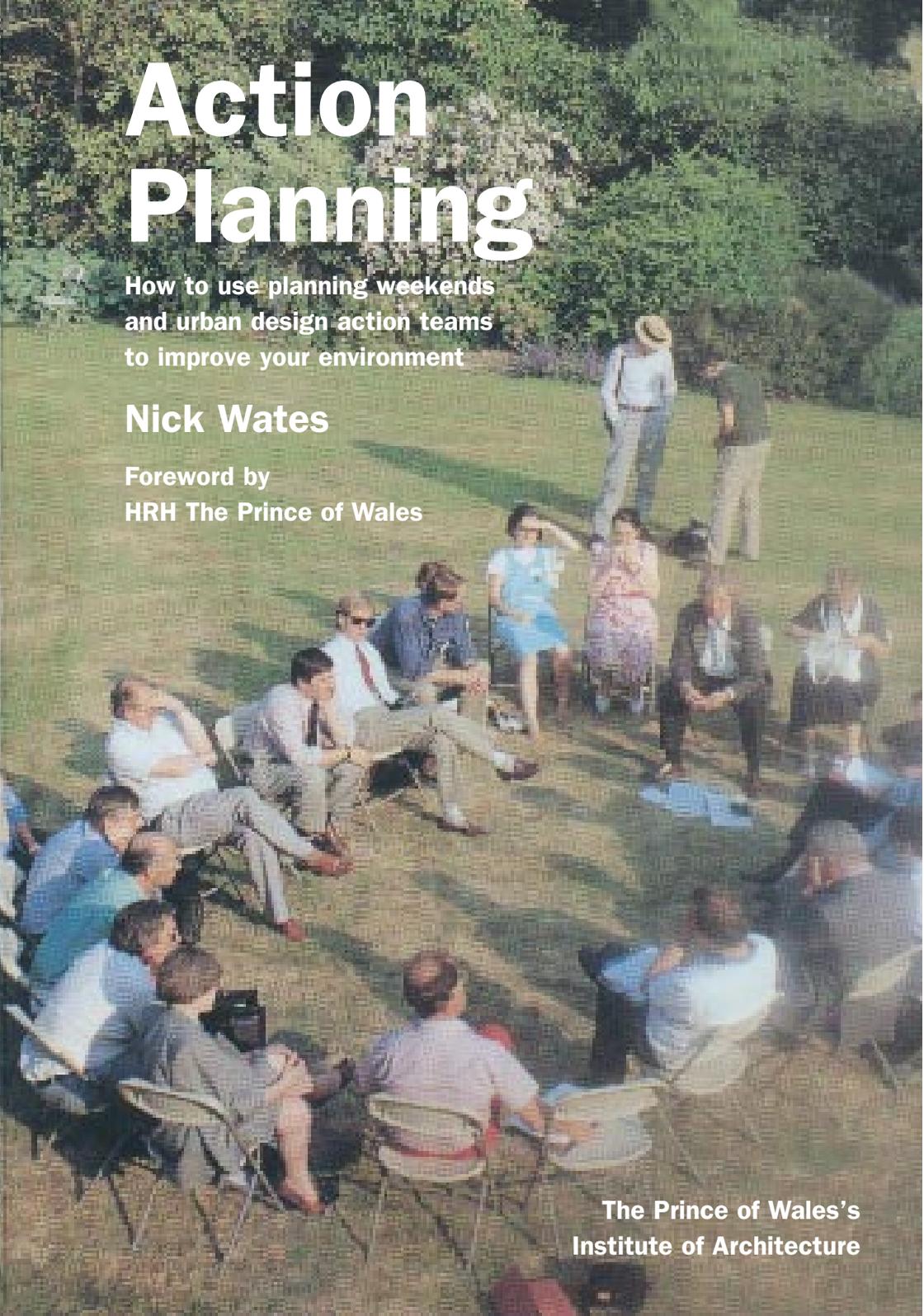


# Action Planning

A high-angle photograph of a group of approximately 15-20 people sitting in a circle on a large, green lawn. They are dressed in professional or semi-formal attire, including suits, blouses, and dresses. Some are looking towards the center of the circle, while others are looking towards the camera. The background shows a dense line of trees and a clear sky, suggesting an outdoor setting like a park or a large estate. The overall atmosphere is one of a formal yet relaxed meeting or discussion.

How to use planning weekends  
and urban design action teams  
to improve your environment

**Nick Wates**

Foreword by  
HRH The Prince of Wales

The Prince of Wales's  
Institute of Architecture

# Book reviews

***“An extremely useful and practical guide...an invaluable source of very down-to-earth advice on this approach to community development.”***

Town Planning Review  
Liverpool University  
April 1997

***“Compiled with great care and thoroughness. It lists the smallest details to which attention needs to be paid in order to make Action Planning fruitful...The text is succinct and well-illustrated...The handbook illustrates the excitement Action Planning events generated in the USA and UK.”***

Dr Meera Bapat,  
Open House International, No 3  
1996

***“Action Planning is marvellous. It’s so good to see all those complexities so clearly sorted out and under one cover. The sequence is brilliant...A million congrats on a job beautifully done.”***

David Lewis  
American Institute of Architects  
April 1996

***“A really useful ‘recipe’ book to help make one’s own local ‘menu’ of a community planning ‘meal’ to suit one’s own taste! I keep it on my desk all the time.”***

Hilary Reed, Planning Department  
Basingstoke & Deane Borough Council  
8 October 1996

***“Your ideas bring fresh air in the bureaucratic world of planning monotony.”***

Professor Santosh Ghosh  
Centre for Built Environment, Calcutta  
16 September 1996

***“A unique guide to the whole process of Action Planning, particularly suitable for those new to the concept and who have a desire to take action for themselves... Clearly and attractively set out, the book is a joy to handle – the size, weight and layout all contribute to its being a truly handy reference guide which encourages you to use it. The text is simple, direct and unpretentious...Its value has been proven in the field – most recently in Kazimierz, Krakow.”***

Partnership Action  
11 June 1996

## **Action Planning**



# Action Planning

**How to use planning weekends  
and urban design action teams  
to improve your environment.**

Compiled and edited by  
**Nick Wates**

Foreword by  
**HRH The Prince of Wales**

Published in association with the  
**Urban Villages Forum**

With the generous support of  
**English Partnerships** and  
**Inner City Aid**



**The Prince of Wales's Institute of Architecture**

## **Action Planning**

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*Freestanding quotations are from written statements or from interviews by the editor unless otherwise indicated.*

Cover photograph: *Team review session at Poundbury Planning Weekend, 1989.*

Frontispiece: *Plenary session at Wornington Green Planning Weekend, 1989.*

# Contents

|                                 |           |
|---------------------------------|-----------|
| <b>Acknowledgements</b>         | <b>6</b>  |
| <b>Foreword</b>                 | <b>8</b>  |
| <b>Introduction</b>             | <b>10</b> |
| <b>1 Overview</b>               | <b>12</b> |
| Context                         | 14        |
| Key features of Action Planning | 16        |
| Benefits of Action Planning     | 18        |
| Why Action Planning works       | 20        |
| The Action Planning process     | 22        |
| <b>2 Getting started</b>        | <b>24</b> |
| Taking the plunge               | 26        |
| Organisation                    | 28        |
| Support bodies                  | 30        |
| Funding                         | 32        |
| <b>3 Preparation</b>            | <b>34</b> |
| Administration                  | 36        |
| Getting people motivated        | 38        |
| Team selection                  | 40        |
| Technical support               | 42        |
| Information gathering           | 44        |
| Publicity                       | 46        |
| Venues                          | 48        |
| Fittings and services           | 50        |
| Equipment and supplies          | 52        |
| <b>4 The event</b>              | <b>54</b> |
| Timetabling                     | 56        |
| Sample timetable                | 58        |
| Briefing                        | 60        |
| Topic workshops                 | 62        |
| Design workshops                | 64        |
| Meals and leisure               | 66        |
| Report production               | 68        |
| Sample reports                  | 70        |
| Presentation                    | 72        |
| <b>5 Follow-up</b>              | <b>74</b> |
| What next                       | 76        |
| Evaluation                      | 78        |
| <b>Appendices</b>               | <b>80</b> |
| Potted history                  | 82        |
| Publications                    | 84        |
| Addresses                       | 86        |
| Events listing                  | 88        |
| Case studies                    | 90        |
| Glossary                        | 92        |
| Action Planning planner         | 94        |

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Richard Ivey

*Workshop at an 'Editing Day' held at The Prince of Wales's Institute of Architecture in February 1995. Thirty-three practitioners, designers, editors and potential readers helped to shape this book using felt-tip pens on wall mounted page blow-ups; a process adapted from Action Planning itself. Participants also took steps to improve the co-ordination of Action Planning support frameworks. An Action Planning Task Group, with representatives from several national organisations, has been set up to continue this work.*



ST. JAMES'S PALACE

Over the last few years I have come to admire greatly the impact and success of a particular approach to Community Architecture known as Action Planning. In Britain, including both Scotland and Northern Ireland, and in other parts of the world, including Germany, I have been greatly impressed and heartened to see the energy and commitment that can be generated by this technique, which brings together interested people from all walks of life and gives them the opportunity over a number of days to discuss in detail ways to improve their built environment. It is a refreshing contrast to the conventional bureaucratic approach to planning, as local authorities and government agencies in countries throughout the world are beginning to discover.

It is essential to find the means to help local people and specialists of every kind to work creatively together in this way if we are to build better and more sustainable communities where people can live in greater harmony with their surroundings. Carefully structured Action Planning events are a promising, and increasingly proven, way of encouraging this. They can be relevant anywhere at any stage of the development process. They can be useful for exploring the future of a single site, a neighbourhood, a town, or even an entire region. Equally, they can be used to explore the impact of new legislation or other factors involving change.

The practice - and art - of Action Planning is still very new. I am delighted that my Institute of Architecture is publishing this first handbook to help people grasp the immense opportunities offered by this valuable technique.

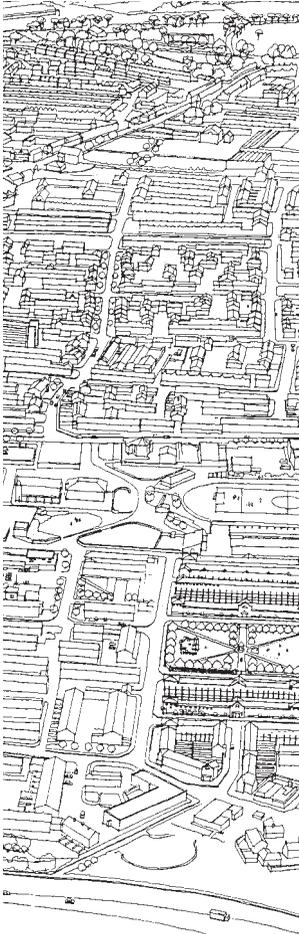
*Charles*

---



*HRH The Prince of Wales taking part in an Action Planning event at Poundbury, Dorchester, 1989. Over 2000 people attended the 5-day 'planning weekend' to explore the implications of building a new town on Duchy of Cornwall property. Over 75% of the 400 people who filled in a questionnaire thought the event worthwhile and almost 90% wanted continued involvement as the project progressed.*

# Introduction



How do you go about improving your city or neighbourhood? How can you make it more useful, enjoyable and sustainable?

‘Action Planning’ could be the start of an answer. By organising an ‘Action Planning event’, you may be able to come up with some visionary new ideas and, just as important, ways of implementing them.

Action Planning is a new technique of urban management which has already been practised to great effect. Instead of relying solely on private initiative and bureaucratic planning procedures, strategies for action are generated by getting all interested parties to work together at carefully structured events - normally lasting 4 or 5 days - guided by a multidisciplinary team of independent specialists.

It must be stressed that Action Planning is only one of many ‘community planning’ techniques available. Others - such as ‘Planning for Real’ or establishing a community design centre or development trust - can be integrated with it or used as alternatives. There are also many variations within the Action Planning formula itself. You will have to assess:

- whether an Action Planning event is the right technique for your particular situation and, if so;
- what type and scale of event would be most appropriate.

Working through this book will help you make an assessment.

Organised well, Action Planning events can be immensely rewarding and a valuable addition to

conventional planning. Organised badly, they can be a sad waste of energy. As with all such techniques, the process is open to abuse unless good practice principles are followed.

This handbook has therefore been produced to allow people to benefit from experience gained so far. It is for anyone wanting to improve their surroundings and particularly for those taking part in, or organising, events. It focusses on the popular 5-day events spanning a weekend, but the same basic principles apply to shorter or longer events. The advice can easily be adjusted accordingly.

The book has been designed to be useful before, during and after events. Double-page spreads are self-contained and include handy sample documents and checklists with space for your own additions. Pages can be blown up to create exhibition panels or reduced to form leaflets or working documents.

Beware though of copying too slavishly. An important part of the process is devising your own process. Use the book as a guide and stimulant, not an instruction manual.

This is the first edition and it is still early days in the evolution of Action Planning. Comments from readers and feedback from events would be most welcome for compiling future editions. Please send to:

The Editor, Action Planning,  
The Prince of Wales's Institute of Architecture,  
14 Gloucester Gate,  
London NW1 4HG.

## Using this book

### Equipment and Supplies

Checklist for large-scale event. Adjust according to requirements.

- Banners and directional signs with fixings
- Base maps and plans of the area at different scales.
- Blackboard and chalk.
- Base model with movable parts.
- Bluetak.
- Box files.
- Camera: (35mm) with wide-angle, telephoto, flash and close-up facility.

**Checklists.** Use these to plan your own events.

### Sample Briefing Pack Letter

Dear

#### Anytown Action Planning Event

Many thanks for agreeing to take part in Anytown Action Planning Event as: (insert role i.e. Team member, Advisor, Admin staff, technical support).

A briefing pack is enclosed containing the

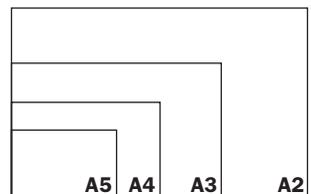
**Sample Documents.** Use these (modified) to save time.

**PRINCIPLES**

- The essential ingredients. Ignore these at your peril.

**TIPS**

- Good ideas (hopefully) based on a bit of experience.



Copy pages as leaflets or exhibition posters.



*"I only went to be nosy. I just went to see what was going on and before I knew what had happened I was in the thick of it. I went Friday, Saturday, went back Sunday for an hour or two and then Monday night as well. I thought it was brilliant. I really enjoyed it. Very hard work but really exciting. It took me a week to sleep properly afterwards; all these ideas were springing back into my head and I was going through them one at a time. What made the weekend so good was having professional people there with local people as well. That was the ideal combination. Having everybody in one room together slogging it out got a lot of good ideas out."*

**Donna Fallows, resident, West Silvertown, London**, speaking after the West Silvertown Community Planning Weekend, December 1993 (shown above with baby).

## Section 1

# Overview

|                                 |    |
|---------------------------------|----|
| Context                         | 14 |
| Key features of Action Planning | 16 |
| Benefits of Action Planning     | 18 |
| Why Action Planning works       | 20 |
| The Action Planning process     | 22 |

# Context



**New approach.**

*Interdisciplinary, collaborative and community-based planning.*

*"If more towns, villages and cities held regular, cathartic events which examined what exactly was happening to their citizens' habitat and attempted to seek solutions which met with the broad approval of the public through a process which mixed professional, public and private interests we would have, I think, a much better country – one where the rejection of the architect would not be automatic and the dead hand of professional planning would be removed."*

**Lee Mallett,**

**Editor,**

***Building Design,***

Editorial, 4 November 1994.

\**R/UDAT Handbook*, page 84.

Action Planning has not suddenly been invented. Rather, the technique has evolved – and is still evolving – from practical experience in many parts of the world. It can best be seen as part of an emerging technology of ‘community planning’ or ‘community architecture’; approaches which make it easier for people to participate in the creation and management of their built environment.

The underlying philosophy of Action Planning is interdisciplinary, collaborative and community-based. The assumption is that better environments can be created if local communities take the driving seat and work closely and directly with a wide range of specialists. In arriving at the fairly sophisticated process described in this book, practitioners have drawn on experience from many disciplines including company management, human psychology and urban design.

As a clearly defined planning technique, Action Planning events lasting 4 or 5 days (the main focus of this book) were pioneered almost 30 years ago in the United States. Over one-tenth of that nation’s population is now estimated to have benefited from over 125 events in a programme run by the American Institute of Architects alone.\* Other national, state and local institutions are also increasingly promoting similar activity.

During the last decade, Action Planning has surfaced in Europe. The American approach has been adapted to the different cultural conditions and fused with European regeneration experience.

Over 25 ‘planning weekends’ and ‘urban design action team’ events lasting 4 or 5 days have now

been held in Europe, mostly in the UK. At the same time a variety of related initiatives have evolved, ranging from 1-day ‘design charrettes’ to urban design ‘task forces’ lasting several weeks.

As yet Action Planning has not been part of the statutory planning process. The initiative for events has come mostly from professional institutions and practitioners keen to explore more creative methods. Developers, community organisations and local authorities have become willing supporters as they seized the opportunity to work positively with the other groups involved. Recently there has been increasing interest from national government which has begun to see the economic and social benefits that can result. The possibility of legislation to incorporate Action Planning in the statutory planning process has begun to be discussed seriously.

In the meantime, events continue to be organised on an ad-hoc basis and the number of enthusiasts grows. An extraordinary feature of the Action Planning phenomenon is the way that people who have experienced it become convinced of its value.

There is still much experimenting and evaluation needed. But those involved in the development of this new activity are confident it will come to play a major role in the future planning and management of human settlements. Whether they are right, and precisely what that role might be, remains to be seen.

## Uses for Action Planning

- **City futures**  
Devising new visions for the future of a city or region.
- **Revival strategies**  
Developing strategies for declining industrial or inner city areas.
- **Agenda 21 strategies**  
Developing Local ‘Agenda 21’ strategies for sustainable development.
- **Traffic solutions**  
Resolving congestion problems in historic town centres or exploring new transport route options.
- **Site proposals**  
Devising and testing development proposals for empty sites or redundant buildings.
- **Design ideas**  
Exploring options for design improvements to historic buildings.
- **New towns**  
Exploring the best way of building major new settlements or integrating new development with old.
- **Development plans**  
Involving the public in the early stages of preparing statutory development plans.

# Key features of Action Planning

There are several types of Action Planning event and a variety of labels have been used to describe them. Common features are:

- **Intensive work sessions**

A fast-paced, intensive programme of work sessions – normally lasting from 4 to 5 days – is preceded by months of careful organisation and followed by practical action and evaluation. Often the event spans a weekend.

- **Community participation**

The driving force for the event comes from within the community and everyone affected is encouraged to be involved.

- **Broad mission**

All the problems and opportunities of a particular site, a neighbourhood, a city or even a region are examined in a holistic manner with a minimum of preconceptions.

- **Multidisciplinary work process**

People from all the relevant disciplines and trades work closely together in a hands-on, non-hierarchical fashion.

- **Independent facilitators**

Events are normally facilitated by a Team of people with no direct involvement in the area or direct vested interest. This helps provide a neutral forum for debate and confidence in the outcome.

*"I cannot think of another opportunity where such lengthy meetings can take place amongst experts in their own fields discussing issues to their bitter conclusion. This is incredibly stimulating since thought processes build on themselves exponentially and realistic solutions to seemingly impossible problems become apparent."*

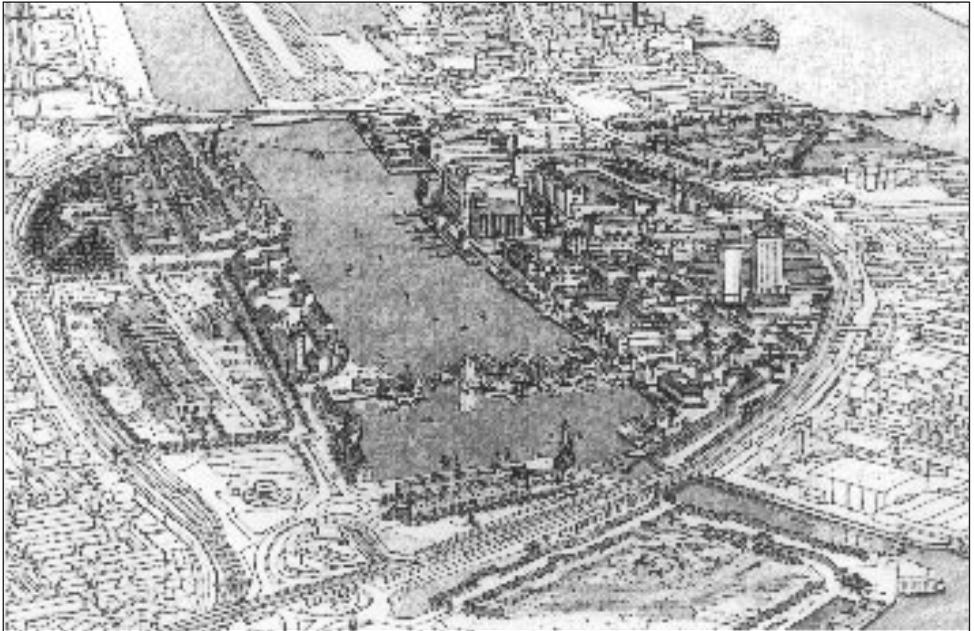
**Michael Baynes,**  
**Development Surveyor,**  
**Hawk Development**  
**Management plc,**  
6 December 1993.

- **High profile**

Events are highly publicised to ensure that everyone has the opportunity to get involved and that the results are widely disseminated. They normally end with a public presentation and written report.

- **Flexibility**

The process can easily be adjusted to suit the needs of each particular community.



## Typical Outcomes

- Visions for an area's future.
- Agreed objectives.
- Agendas for action.
- Proposals for a particular site or programme.
- Suggestions for organisational changes.
- Achievable targets.
- Local coalitions and leadership.

### **Holistic.**

*Vision for a new urban village in London's docklands conceived and drawn up during an Action Planning event. Top: site as existing. (West Silvertown, 1993.)*

# Benefits of Action Planning

Action Planning can achieve objectives which are hard to achieve in any other way. These include:

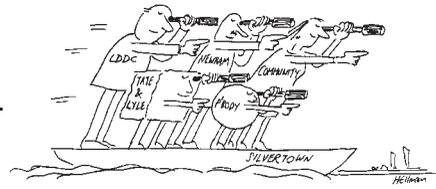
- **Creation of shared visions** for a community's future and identification of long- and short-term strategies for implementing them.
- **Catalyst for action** of all kinds by releasing blockages in the development process.
- **Resolution of complex problems** or at least a clearer identification of issues and goals.
- **Revitalisation of local networks** for community development.
- **Fostering of consensus building** among different interest groups leading to better integration.
- **Promotion of urban design capability** of local agencies and improvement of environmental standards.
- **Heightened public awareness** of development issues resulting from the provision of an open forum for debate.
- **Morale boost** for all those involved as a result of experiencing team working.

*“Action planning can be extremely successful both in galvanising community participation and allowing collective decisions to be made in an efficient and effective way. An Action Planning event that has been properly designed has the ability to create a unique chemistry of activity and energy, bringing together all the potential players working towards a common goal, and with the ability to produce new and sometimes unexpected results in a more effective way than by using conventional professional methods alone.”*

**John Thompson,**  
**Chairman,**  
**John Thompson & Partners,**  
7 February 1995.

**Action Planning should NOT be seen as:**

- A substitute for a statutory planning framework.
- A substitute for long-term participatory programmes.
- A technique for consultation only; it is essentially a participatory process.
- A way of replacing the services of local professionals and/or officials.
- A way of imposing ideas on a community from outside.



**Shared visions.**

Getting public, private and voluntary sectors to move in the same direction.  
 (Cartoon by Louis Hellman, depicting the main stakeholders – development corporation, landowners, local authority, developers, local community – at West Silvertown Community Planning Weekend, 1993.)

**Typical Products**

**Immediate**

- A set of proposals for action set out in:
  - a broadsheet and press release.
  - an illustrated report.
  - an exhibition.
  - a slide show.

**Short term**

- Local steering committees to build on the event’s work.
- Periodic progress reports.

**Long term**

- Ongoing programme of activities.
- Evaluation of the impact of the event.

# Why Action Planning works

Action Planning ‘works’ because the process combines a unique mix of ingredients which respond to the complexity of today’s development issues:

- **Open community involvement**

There is scope for all members of the community to participate in a wide variety of ways. This can lead to a new sense of cohesion and consensus on goals, to the formation of new partnerships and to the development of a sense of equity.

- **Creative working methods**

Professionals of all disciplines work in a hands-on manner with each other and with non-professionals in a neutral environment. This breaks down conventional professional boundaries and creates a chemistry between people which can be magnetic; releasing spirit, humour, imagination, positive thinking and collective creativity.

- **Dynamism**

The carefully structured, defined timetable creates a focus of public attention and provides deadlines for results. A critical mass of activity is generated which is hard to ignore.

- **Fresh thinking**

The independent Team provides an opportunity for new ideas to be put forward which can overcome past divisions and indecision. Proposals emerge which nobody would ever have imagined.

*“I know from my own experience that Action Planning can create a shared vision for regeneration and bring innovative solutions from the people who have to live with the effects. It instills a sense of ownership ensuring that the outcomes are more sustainable.”*

**David Taylor,**  
**Chief Executive,**  
**English Partnerships,**  
15 February 1995.

- **Visual approach**

The use of urban design techniques of drawing and model-making provides an easily accessible way for people to think about, and communicate, visions for their community's future.

- **Realism**

The process addresses both the physical and natural environment as they are, rather than the abstract concepts which tend to result from specialism and departmentalism. The inhabitants' own concerns are placed on the agenda.



**Unique chemistry.**

*Professionals, local residents, politicians and developers take time off for group photographs (Cape Hill, Sandwell, 1990; Poundbury, 1989 and West Silvertown, 1993).*



# Action Planning process

Who does what and when

|  |   |
|--|---|
| <p><b>Getting Started</b> </p> <p>1–2 months*</p> |   |
| <p><b>Local Interests</b><br/>Individuals and organisations</p>  | <ul style="list-style-type: none"> <li>• Concern to improve environment.</li> <li>• Stimulate action.</li> <li>• Establish Steering Group and Host (see below).</li> </ul>  |
| <p><b>Steering Group/ Host/Organiser</b><br/>Main enthusiasts and technical advisors</p>   | <ul style="list-style-type: none"> <li>• Formation/appointment.</li> <li>• Explore options for action.</li> <li>• Prepare proposal.</li> <li>• Stimulate enthusiasm.</li> <li>• Secure commitment from all affected parties.</li> <li>• Raise funds.</li> <li>• Commitment to proceed.</li> </ul> |
| <p><b>Event Team</b><br/>Specialists from complementary disciplines</p>  |   |
| <p><b>Support Bodies</b><br/>National, international and regional organisations</p>  | <ul style="list-style-type: none"> <li>• Supply general information and advice.</li> <li>• Evaluation visit if requested.</li> </ul>  |

*“It’s a fantastic way of putting a major scheme together and could revolutionise the way we do development. It could be a blueprint for putting major commercial schemes together.”*

**Barry Wick, developer,**  
**London & Edinburgh Trust plc,**  
*Building Design,*  
3 February 1989.

**\*Timescales.**

Action Planning events can be of varying lengths but the process remains more or less the same. The length of the event and the lead times will be determined by the nature of the issues faced and the extent and capacity of existing local networks. Timescales

| <b>Preparation</b> ▶<br>2–4 months*   | <b>The Event</b> ▶<br>several days*   | <b>Follow-up</b> ▶<br>ongoing*   |
|---|---|--|
| <ul style="list-style-type: none"> <li>• Build momentum, enthusiasm and expectation through discussion and by focussing attention on the main issues.</li> </ul>  | <ul style="list-style-type: none"> <li>• Participate in public sessions.</li> </ul>   | <ul style="list-style-type: none"> <li>• Analyse proposals.</li> <li>• Develop support for strategies and projects.</li> <li>• Apply pressure for implementation.</li> <li>• Ongoing participation.</li> </ul>                 |
| <ul style="list-style-type: none"> <li>• Select Team Chairperson, Team members, Advisors and consultants.</li> <li>• Establish administration and technical support.</li> <li>• Gather information.</li> <li>• Prepare venues.</li> <li>• Publicise.</li> </ul> | <ul style="list-style-type: none"> <li>• Event management and administration.</li> </ul>  | <ul style="list-style-type: none"> <li>• Assess proposals and prioritise.</li> <li>• Agree plan of action.</li> <li>• Publicity.</li> <li>• Spearhead and co-ordinate implementation.</li> <li>• Maintain momentum.</li> </ul> |
| <ul style="list-style-type: none"> <li>• Homework on the locality and the Action Planning process.</li> <li>• Reconnaissance visit by Chairperson.</li> </ul>   | <ul style="list-style-type: none"> <li>• Arrive.</li> <li>• Reconnaissance.</li> <li>• Briefings.</li> <li>• Topic workshops.</li> <li>• Design workshops.</li> <li>• Brainstorm.</li> <li>• Prepare proposals.</li> <li>• Presentation.</li> <li>• Leave.</li> </ul> | <ul style="list-style-type: none"> <li>• Revisit and assist as requested.</li> </ul>   |
| <ul style="list-style-type: none"> <li>• Supply detailed information and contacts.</li> </ul>   | <ul style="list-style-type: none"> <li>• Observe.</li> <li>• Participate.</li> <li>• Assist if asked.</li> </ul>  | <ul style="list-style-type: none"> <li>• Monitor and evaluate.</li> <li>• Assist if asked.</li> </ul>  |

shown above have been found to be the most effective for major urban design issues of, say, a neighbourhood or city. Shorter events work well for simpler issues such as making proposals for a single site. Shorter lead times are possible where local networks are well developed. Longer lead times can be useful for building community capacity.



**Community participation.** Staged publicity photograph organised by Hulme Regeneration Ltd with local schoolchildren in 1992. The aim was to generate publicity for, and encourage participation in, a community planning weekend to create a strategic masterplan for the physical, social and economic regeneration of an inner city neighbourhood in Manchester.

## Section 2

# Getting started

|                   |    |
|-------------------|----|
| Taking the plunge | 26 |
| Organisation      | 28 |
| Support bodies    | 30 |
| Funding           | 32 |

# Taking the plunge

So you think you want to hold an Action Planning event? Congratulations. But here's a list of 10 things you should check out before making a definite decision:

- 1 Read right through this handbook to make sure you understand what will be involved. Check out other sources (see *Publications* page 84).
- 2 Discuss it informally with people who have done it before and organisations that might provide support (see *Addresses* page 86).
- 3 Form a Steering Group to coordinate the event. This should reflect the community's diversity and include all main enthusiasts and key players.
- 4 Think through what kind of event is likely to be most suitable for the specific issues you face and who might act as Host and Organiser.
- 5 Think through whether to hold an event under the umbrella of a regional, national or even international organisation. This can provide clout and experience (see *Support Bodies* page 30).
- 6 Write a 'mission statement' setting out the objectives and how and by whom they are going to be achieved (see samples on next page).
- 7 Prepare budget estimates and funding strategy (see *Funding* page 32).
- 8 Approach key representatives of the main interested local parties to get their support.
- 9 Ask yourselves, do you have, or can you be sure of getting:
  - broad local support?
  - keen Steering Group, Host and Organiser?
  - enough funding or support in kind?
  - clear and achievable mission statement?
  - capability to follow up afterwards?
- 10 If the answer is yes, **go for it**.

*"The huge amount of effort invested in this weekend has paid dividends. The event has not only resulted in a coherent vision for Hulme 5 (housing estate), but has also shifted entrenched attitudes and ploughed through prejudice. Hulme will never be the same again – and neither will those who attended."*

**Lesley Whitehouse,**  
**Chief Executive,**  
**Hulme Regeneration Ltd,**  
quoted in event report,  
November 1992.

## Sample Mission Statements

### New Visions for Anytown

Anytown is suffering from a number of difficulties caused by the decline of traditional industries and lack of investment for housing maintenance.

There is high unemployment, homelessness, a number of derelict sites in the town centre and a general sense of uncertainty and despondence.

Several solutions have been put forward over recent years but little action has taken place because of lack of agreement on priorities and lack of funds.

It is proposed to organise an Action Planning event next Spring.

The objective is to create a new sense of vision for the town by inviting all members of the community to explore possible options with a Team of specialists from elsewhere.

A programme of long- and short-term action will be drawn up. A four-day event is proposed spanning the weekend before Easter. This fits in well with the town council's deadline for a response to developers' proposals for some of the town centre derelict sites and a conference a month later on how to implement Local Agenda 21.

The event is being organised by the Anytown Environment Network in association with the National Urban Trust. It is supported by Anytown Council and the Anytown Chamber of Commerce. Sponsors include Shell and Greenpeace. Architects Company, which has considerable experience of Action Planning, will be engaged to provide the administration and a technical support team will be provided by Anytown College Urban Design Department.

The National Urban Trust will assist with assembling the Team of specialists and will monitor progress after the event has taken place.

### Anyvillage Traffic Management

Increased traffic in Anyvillage is causing problems for residents and traders alike. Parking is hard to find and there have been several unpleasant incidents involving abuse and even violence on one occasion. Proposals by the local planning department for new car parks have been widely opposed.

Anyvillage parish council proposes to hold a one-day Action Planning Event to thrash out some options. The event will take place during the day and evening to ensure that everyone who wants to has an opportunity to take part. A Team of transport and urban design specialists will facilitate the event and make recommendations. In preparing for the event, the parish council is being assisted by the village school, which is making a model, and officers from the county council planning department. Support and advice is also being provided by the national Civic Trust.

# Organisation

## Anytown Action Planning Weekend 4-8 April 1996

Organised by Anytown Environment Network in  
association with the National Urban Trust  
Supported by Anytown Town Council and Anytown  
Chamber of Commerce  
Sponsored by Shell and Greenpeace

**Building partnerships.**  
*Producing a sheet of  
notepaper is a good way to  
think through how to  
position the event.*

\* It is common practice, particularly in America, for Team members to receive expenses only and to agree not to accept commissions arising from their recommendations. But the process is also increasingly becoming part of standard professional workpractice with Team members being paid fees accordingly. Both approaches have their strengths. The important thing is to have clear and open policies.

Action Planning events may be initiated by any individual or organisation. Once the idea has taken root there are various organisational models but most fit within a standard framework (shown diagrammatically opposite).

## PRINCIPLES

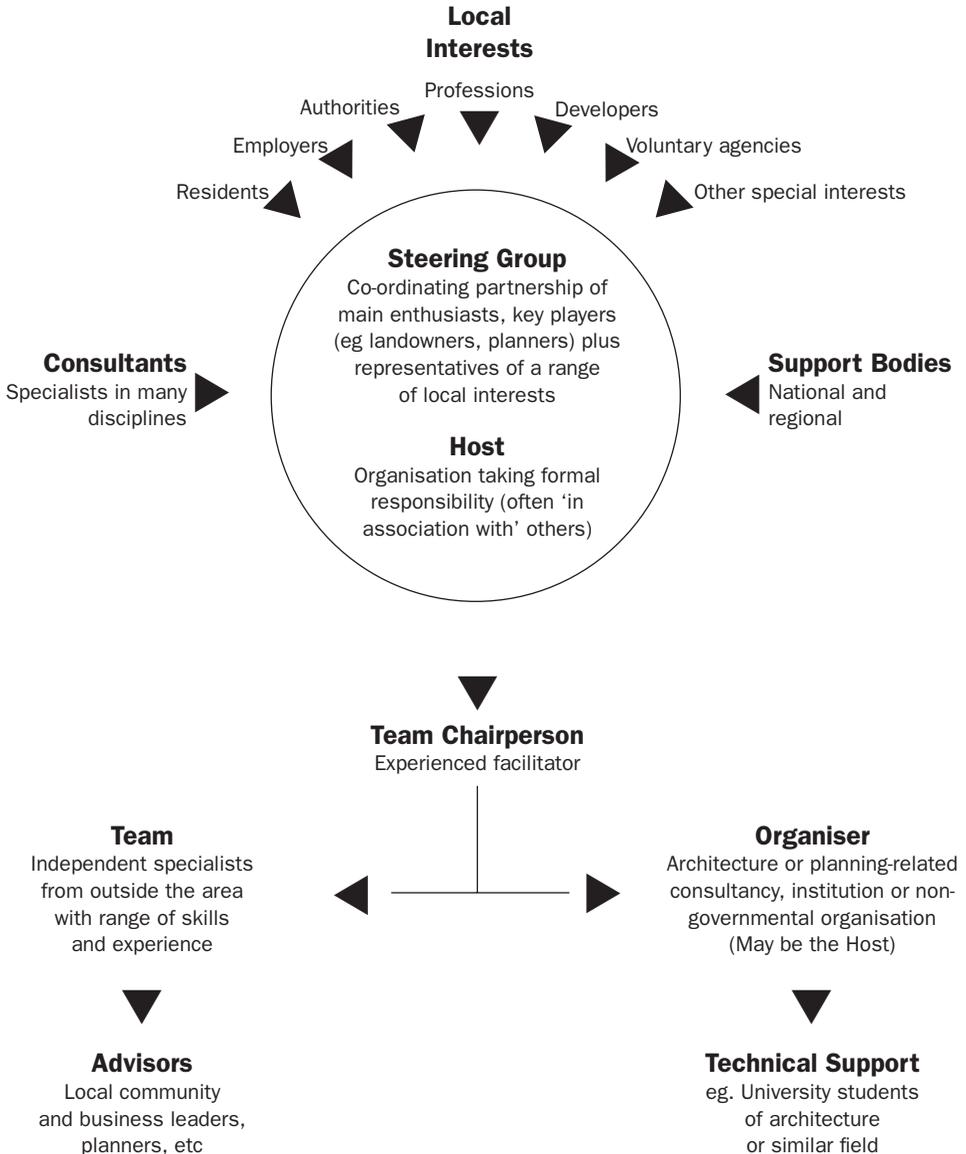
- Existing participation mechanisms should be built on but a new single-minded mechanism should be created with complete freedom of action.
- Ultimate responsibility for hosting the event should be taken by a single organisation but this will often be on behalf of a partnership of relevant interests, usually formalised as a Steering Group. The Host may appoint a professional organiser and/or administrator.
- A Team of independent specialists should be appointed to take responsibility for facilitating the event and making recommendations. The Team may be from a regular consultancy or be specially handpicked. Members may be paid or unpaid.\*
- The Team Chairperson should be carefully selected. He or she may wish to work with a core group with previous experience of working together. During the event itself, the Team Chairperson should be in sole charge.

## TIPS

- Invite non independent specialists (eg local planners and community leaders) to participate as Advisors not Team members. Otherwise the validity of the recommendations may be jeopardised.

# Organisation framework

Working arrangements for an Action Planning event



# Support bodies



**National facilitator.**

*Charles Zucker, employed by the American Institute of Architects to help communities organise Action Planning events, speaking in London, 1995.*

*"In many ways, the process has transformed the way that Americans shape community development policies and take those actions that most directly affect their community's growth or change."*

**American Institute of Architects,**  
*R/UDAT Handbook, 1992.*

Action Planning events often benefit from being supported by a national or regional organisation. Some organisations, particularly in the United States, have institutionalised their support into recognisable programmes. Support can include:

- **Advice** on the most suitable type of event based on experience.
- **Stimulation** of interest by provision of briefing material and speakers.
- **Validation** of the event which can be invaluable in overcoming scepticism at local level.
- **Assistance** with practicalities such as Team selection (through maintaining databases of talent) or Team briefing.
- **Organisation** of anything from an initial meeting to an entire event.
- **Momentum** ensuring that follow-up takes place.

In exchange for providing anything more than advice, most support organisations will insist on certain procedures being followed to maintain quality control. These will vary from one organisation to another.

Most support organisations simply respond to requests for assistance. But some may be proactive, encouraging and even organising events. This is particularly the case in the early stages of developing a support framework which is normally done by organising pilot events.

*See page 86 for details of some support bodies.*

## Types of Support Body

- **Professional groups**  
Institutes of architecture, planning or urban design for instance. Some have a special unit for Action Planning with a co-ordinator and committee (called “Oversight Committee” in the USA).
- **Universities and colleges**  
Some have a special unit. More likely to be a sporadic activity of a Department such as Architecture or Planning.
- **Local government**  
Can be part of the work of a planning or other department.
- **Regeneration agencies**  
As part of the work of a development trust or other special agency.
- **Consultancies**  
Support may be provided by private consultants who have developed the expertise in house.
- **Partnerships of agencies**  
A special unit may be established by a group of organisations, particularly at regional level.

## Requirements

Before getting involved in a local event, most support agencies will want the following information from the event’s proposers:

- Nature of the proposers.
- Brief description of community.
- Statement of current problems and background.
- Objectives of proposed event.
- Budget estimates.
- Statement of commitment from local sponsors.
- Letters of support for the concept from various sections of the community.
- Statement of commitment from the promoters to follow up the event.
- Any helpful photos or other illustrative material.
- .....
- .....
- .....

# Funding



**Value for money.**

*Action Planning may appear expensive at first sight, but the cost of getting it wrong can be astronomical (tower block demolition, London 1985).*

*“You shouldn’t do one of these things unless you are able to follow-up for two to three years at least. Action Planning events must be the beginning of a process, not isolated events.”*

**Jon Rowland,**  
**Chairman,**  
**Urban Design Group,**  
September 1995.

Action Planning events can be designed for a range of budgets. But insufficient funds, for the type of event you decide on, can lead to a failure to generate the critical mass of energy necessary for success. Establishing realistic budgets and securing enough money – or support in kind – is therefore very important.

**PRINCIPLES**

- Funding should come from as many sources as possible. This encourages commitment to a partnership approach from the start and avoids charges of vested interest. If single source funding is inevitable, the need for a validating body will be greater.
- There are many opportunities for securing financial sponsorship and support in kind, particularly if the event is enthusiastically supported by the community and is high-profile.

**TIPS**

- Think twice before doing an event ‘on the cheap’. It is most likely to lead to bitterness and recrimination. It is better to have a shorter, well funded event than a longer, badly funded one. Always allocate funding for follow-up.
- If you find it hard to get enough funding and support, try holding a 1-day event first with a view to generating interest in a longer one later.
- To avoid resentment and/or manipulation, be clear and honest about what is being paid for and what is not.

## Sample Event Costs

Mid-range estimates for 5-day events with Teams of 8 assuming no support in kind. Excludes cost of organisation and administration and assumes Team members are unpaid. Adjust accordingly.

| Item and assumptions                              | £              | £           | £          |
|---|----------------|-------------|------------|
|   | National Event | Local Event | Your Event |
| Evaluation visit (travel, expenses)               | 400            | 50          | .....      |
| Reconnaissance by Chairperson (travel, expenses)  | 400            | 50          | .....      |
| Transport (Team members)                          | 1600           | 200         | .....      |
| Accommodation (Team members, 5 nights @ £50)      | 2000           | 0           | .....      |
| Venues (rent)                                     | 1000           | 500         | .....      |
| Equipment hire                                    | 750            | 500         | .....      |
| Publicity, advertising, stationery                | 800            | 600         | .....      |
| Catering (Team @ £25 per day plus snacks for all) | 1500           | 1500        | .....      |
| Car/van/bus rental                                | 200            | 160         | .....      |
| Film and processing (40 rolls @ £7.50)            | 300            | 300         | .....      |
| Typists/word processors (100 hours @ £4)          | 400            | 400         | .....      |
| Report printing (1000 copies x 100 pages @ £0.03) | 3000           | 3000        | .....      |
| Debriefing visit (2 people, travel and expenses)  | 800            | 100         | .....      |
| Revisit (4 Team members, travel, expenses)        | 1600           | 200         | .....      |
| Follow-up (unspecified)                           | 1000           | 750         | .....      |
| Sundries (supplies, telephone etc)                | 1000           | 1000        | .....      |
| <b>Totals</b>                                     | <b>16750</b>   | <b>9310</b> | .....      |

## Funding Sources

- Local and central government
- Local and national businesses
- Local and national charities
- Developers and landowners
- Development agencies
- Community groups
- Arts councils
- Professional institutes
- .....
- .....

## Support-in-kind Ideas

- Hoteliers      Rooms
- Printers      Printing
- Consultants      Admin
- Property owners      Premises
- Colleges      Students
- Businesses      Meals
- Bus companies      Transport
- Local press      Advertising
- Residents      Lodgings
- .....



**Setting the stage.** Banners help people to orientate themselves and provide a useful backdrop for photographs. (King Cross Planning Weekend, London, 1990.)

## Section 3

# Preparation

|                          |    |
|--------------------------|----|
| Administration           | 36 |
| Getting people motivated | 38 |
| Team selection           | 40 |
| Technical support        | 42 |
| Information gathering    | 44 |
| Publicity                | 46 |
| Venues                   | 48 |
| Fittings and services    | 50 |
| Equipment and supplies   | 52 |

# Administration

Good administration is essential. The event must run like clockwork or energy will be dissipated and the results will be poor. Whether the event is organised by paid staff or by volunteers the principles are the same.

## PRINCIPLES

- Once a decision has been made to proceed, responsibility for all preparation tasks should be determined (see checklist opposite).
- Clear guidelines about the nature of the event should be produced so that everyone knows where they stand.

## TIPS

- Don't set a date until you are sure you can meet it. Fast-track events are possible but having a longer lead time is normally more likely to bear fruit. Avoid holiday periods and major local attractions. Best to be 'the only show in town'.
- Be clear about the extent of participation. Don't pretend there is an open agenda if in fact decisions have already been made.
- Avoid being unduly influenced! You may be lobbied from all sides by people promoting their own interests. Make it clear that the event is open to all and that the process is neutral, not 'fixable'. Suggest people make their case at the event.

*"The impact of the R/UDAT (Action Planning) programme on the (American) nation's cities is unequalled by any other design activity over the past decade. No consultant organisation has worked so closely with so many communities. No government agency has dealt with such a rich variety of issues. The breadth, quantity and quality of experienced talent in the R/UDAT process exists in no institution or in any consultant organisation."*

**Peter Batchelor,  
David Lewis,  
authors,**  
*Urban Design in Action,*  
1985.

## Typical Tasks

### 3-6 months before

- Establish Steering Group and Host.
- Decide nature of event.
- Approach support body and organiser.
- Secure funding.
- Secure support in principle locally.
- Decision to go ahead.
- Establish administration.
- Inform local grapevines.
- .....

### 1-3 months before

- Select Team Chairperson.
- Start information gathering.
- Secure venue.
- Fix dates of event.
- Prepare timetable.
- Invite Team members (letter).
- Contact speakers (letter).
- Book accommodation.
- .....

### 1 month before

- Reconnaissance visit.
- Start publicity.
- Send out invitations.
- Staff organisation.
- Equipment hire.
- Creche organisation.
- Refreshments organisation.
- Equipment assembly.
- .....

### 2 weeks before

- Advertisements in press.
- Make banners.
- Check insurance.
- Check transport arrangements.
- Send out briefing packs.
- .....

## Team Chairperson Qualities

- Experience of previous Action Planning events, preferably as Team member.
- Leadership qualities.
- Sensitivity and ability to draw people out.
- Understanding of urban design processes.
- Ability to orchestrate action.
- Toughness (may have to ask someone to leave the Team or deal with troublemakers).
- .....
- .....
- .....

## Reconnaissance Visit

One month before the event the Chairperson should check the following:

- Budget.
- Venues.
- Publicity.
- Printing schedules.
- Film processing arrangements.
- Information gathering progress.
- Briefing pack.
- Report format.
- Equipment.
- .....
- .....
- .....

# Getting people motivated

Action Planning events are likely to be most successful if there is widespread support and involvement from the outset. Often this will require imaginative promotion because it is still an unconventional approach which people may not be used to.

## PRINCIPLES

- All sections of the community should be involved, particularly all the key decision-makers.
- Local groups should be encouraged to get their own members involved but should not be relied on to do so. Responsibility must lie with the organisers.
- The event should be promoted as an exciting and enjoyable opportunity, not a duty. People should take part because they want to not because they feel they ought.

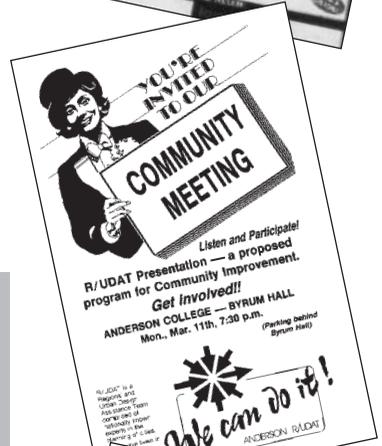
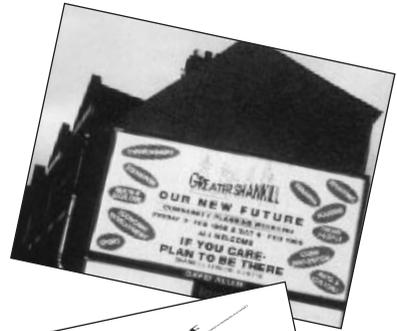
## TIPS

- Be prepared for some hostility from people who think they know it all and resent you treading on what they see as their patch. Overcome it by using past examples and talking through the process.
- Get out in the community. Local public meetings at an early stage can be useful for informing people about the process, identifying the main issues and interest groups and for stage management. Keep them as informal and open-ended as possible. Consider also a newsletter, leaflet, site office, advertising hoarding and any special communication methods appropriate to the specific community.

*"This process allows the members of the community to take a proactive role in the development of their community instead of the reactionary role usually associated with public hearings and the like. Events like this are our chance to bring the community, the developers and the city, county and the state agencies also the elected officials together to formulate a shared vision for an area."*

**Tom Bradley,**  
**Mayor of Los Angeles,**  
letter to American Institute  
of Architects, 20 June 1990.

- Invite key interest groups and individuals by letter. Also make as much personal contact as possible.
- Style is important. Develop a lively, straightforward, friendly design style and encourage a casual yet professional approach from the outset.
- Don't be afraid to state clearly that the most effective motivation for involvement is enlightened self-interest.
- See also *Publicity*, page 46.



## Groups to involve

- Friends and neighbours.
- Local councils, politicians and administrators.
- Planners and planning committees.
- Regional agencies and key staff.
- Chambers of commerce.
- Local business people.
- Community and voluntary organisations.
- Developers and real-estate professionals.
- Special purpose authorities such as housing and transport.
- Schools, colleges and universities.
- Environmental and civic groups and societies.
- Youth and senior citizens groups.
- Churches.
- Ethnic and cultural groups.
- Social and emergency services.
- Media (local and regional)
- Investors.
- .....
- .....

**Inviting involvement.**  
 Advertising hoarding and  
 publicity leaflets (Shankill Road,  
 Belfast, 1995; Anderson,  
 Indiana, USA, 1985 and Blairs  
 College, Scotland, 1994).

# Team selection



**Orchestration.**

*Architect Richard Burton,  
Chairperson of the first UK  
Action Planning event  
(Southampton, 1985).*

“A heartfelt thank you to the government and councillors of Birmingham for inviting me to their city and so gracefully putting up with my comments. To ask people to come to see you and then allow them, encourage them even, to be frank in criticism as well as in praise is a sign of creative spirit.”

**Team member,  
Highbury Initiative,  
Birmingham, 1988,  
quoted in event report.**

Selecting the event ‘Team’ is one of the first tasks of the Team Chairperson and will shape the flavour of the entire event.

## PRINCIPLES

- Team size should reflect the scale and scope of the event. Usually 8–12 members works well.
- Team members should have a range of skills and interests tailored to the needs of the particular community and the issues likely to be raised.
- Team members should be free of any real or perceived conflicts of interest in the area or, if they have any interest, it should be clearly stated.
- Team members should commit themselves to attending the entire event. (People unable to stay for the whole period should be advisors instead.)

## TIPS

- Enlist the best professional expertise available within your area of influence.
- Select people for what they know rather than who they are, and for their ability to analyse complex issues as part of a team. It is useful to have some people who have been Team members before.
- Give all Team members specific roles (see table right).
- Avoid people who are too similar. A balance of sexes and a range of ages is essential.

## Team Roles and Responsibilities

Note: Several compatible roles may be taken by one individual.

| Title                     | Brief  | Names |
|---------------------------|--|-------|
| Team Chairperson          | Provide leadership, orchestrate event, take responsibility.                    | ..... |
| Team facilitator          | Keep roving eye on group dynamics, reporting back to Team Chairperson.         | ..... |
| Workshop facilitators     | Facilitate workshops.  | ..... |
| Workshop note-takers      | Prepare notes of workshops in format suitable for final report.                | ..... |
| Report editor             | Commission and gather copy and illustrations. Prepare camera-ready copy.       | ..... |
| Report subeditor          | Subedit copy and assist editor.  | ..... |
| Report production manager | Liaise with printer and photo lab. Coordinate graphic design.                  | ..... |
| Sound recorder            | Tape key sessions and index tapes.   | ..... |
| Diplomats                 | Liaise between different workshops to create linkages.                         | ..... |
| Photographer              | Ensure key events are photographed (slides and prints). Liaise with photo lab. | ..... |
| Contacts person           | Keep names and telephone numbers of useful resource people.                    | ..... |
| Follow up co-ordinator    | Ensure follow-up takes place and publicise.                                    | ..... |
| Slide show editor         | Select slides for presentation.  | ..... |
| Stage manager             | Co-ordinate pool of people for errands etc.                                    | ..... |

## Expertise Required

Skills and professional backgrounds likely to be useful on the Team:

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Urban design         | <input type="checkbox"/> Planning              | <input type="checkbox"/> Landscape design      |
| <input type="checkbox"/> Property development | <input type="checkbox"/> Economics and finance | <input type="checkbox"/> Law                   |
| <input type="checkbox"/> Sociology            | <input type="checkbox"/> Management            | <input type="checkbox"/> Community development |
| <input type="checkbox"/> Architecture         | <input type="checkbox"/> Journalism            | <input type="checkbox"/> Ecology               |

Everyone, if possible, should be good at writing, drawing, organising, analysing complex problems, be in good health and be good at working with people.

# Technical support

To provide back-up for the event Team it is useful to have technical support before and during the event. Although volunteers or paid staff can provide this, it is often better to involve local students of architecture or related disciplines.

## PRINCIPLES

- Taking part in an Action Planning event can be a rich learning experience in organisation, planning, architecture, participatory processes, research and presentation.
- Students can provide a cheap, energetic labour force who will pass on the process to others. Students of architecture, planning and urban design are generally most likely to benefit and be useful.
- Within an initial time framework set by their tutors, students should be directed by the Team Chairperson or other delegated Team member. Tutor interference during the event can cause serious difficulties.

## TIPS

- 3 or 4 students is enough to make a coherent workforce without dominating the event.
- Choose students who are energetic, keen, flexible, sociable, diplomatic and can take initiative. Wherever possible provide clear roles and briefs. Treat students as equal members of the creative effort, not dogsbodies.
- Encourage students to make a presentation of their experience afterwards.

*"It was like being back at college but I realised that there were 500 years of professional experience around the table. I came to the event as a cynic but left exhilarated. I have not had so much fun as a professional for some time. It recharged my batteries. When you hit the inevitable mid-life crisis in any project, having one of these events is a good way to give it a kick up the backside."*

**Mike Galloway,**  
**Director, Crown Street**  
**Regeneration Project,**  
**Glasgow,**  
 December 1993.

## Technical Support Tasks

### Before the event:

- Gather background material.
- Generate publicity.
- Get to know the site and local people.
- Read this handbook and other material.
- Prepare exhibition and briefing for Team members.
- Prepare base models and plans.
- .....
- .....

### During the event:

- Maintain a library of information.
- Service workshops.
- Act as personal assistants to the Chairperson.
- Take and collate photographs.
- Participate in all activities as much as possible.
- .....
- .....

### After the event:

- Collate and store information for future use.
- Monitor effectiveness of the event.
- .....
- .....



**Modelmaking.** Students from Moscow University preparing a 3-metre-square model for the ECO 1 Action Planning event in 1991. This became the focus for open-ended discussions with local people; problems and solutions being recorded on cards pinned to the model with cocktail sticks. A consensus view was thus established from which the design team could work.

# Information gathering

It is important to provide enough information for participants both before and during the event, otherwise the event will be spent gathering information rather than thinking out the way forward.

## PRINCIPLES

- Selecting and presenting information is a central element of the Action Planning process and should be directed by the Team Chairperson.
- A briefing pack should normally be sent out to the main participants two weeks beforehand. Other material can be available at the event.

## TIPS

- Use information that already exists where possible. Get key stakeholders to prepare presentations as this promotes active involvement.
- Start thinking about what will be needed for the final presentation right from the start. Collect data in the appropriate formats.
- Be selective. Too much information can overwhelm people and inhibit imaginative thinking.
- Set up a resource library and keep an index of useful material. Identify resource people to collect information on specific issues; eg: jobs, crime.
- Think visual. Good photos, drawings, maps and graphs are more useful than wordy reports.
- Tie important reports and documents to table tops with string to avoid people mistaking them with handouts and walking off with them.

*"The whole process was extremely creative. It brought a lot of people together."*

**Ted Watts,**  
**Past President,**  
**Royal Institute of**  
**Chartered Surveyors,**  
 December 1993.

## Basic Information Required

Not everything will be relevant on all occasions. Select what is and add anything else you think might be useful.

Maps, tables, reports and videos showing:

- Land use, transport and building condition.
- Political, administrative and cultural boundaries.
- Topography and ecology.
- Development plans and proposals, zoning and previous studies.
- Landownership, land availability and land valuation (including impact of over/under supply in the future).
- Population statistics and projections.
- Employment patterns.
- Tax information.
- Profiles of local organisations.
- Historical data: archaeological, protected buildings, area development.
- Tourist and area promotion information.
- Concerns and opportunities lists.
- Aerial photographs.
- Blank base maps at various scales.
- Information sources.
- Newspaper cuttings.
- Social profiles.
- .....
- .....
- .....
- .....

## Sample Briefing Pack Letter

Dear

### Anytown Action Planning Event

Many thanks for agreeing to take part in Anytown Action Planning Event as: (insert role i.e. Team member, Advisor, Admin staff, technical support).

A briefing pack is enclosed containing the following information for you to look at before you arrive:

- Mission statement.
- Team list with roles and responsibilities.
- Biographical notes on Team members.
- Timetable.
- Background material: (some of the material listed in the Basic Information Required box left).
- List of what else will be available during the event.
- Copy of *Action Planning*.

Accommodation and travel arrangements are as follows: (insert details with contact telephone numbers).

Payment and expenses arrangements are as follows: (insert details with any special restrictions on future commissions etc).

Please remember to bring your camera and any relevant slides or other material for the exhibition and presentation. Mark these clearly with your name if you want them returned.

I would be grateful if you would confirm in writing that the above arrangements are satisfactory and look forward to seeing you at (place) on (date).

Yours sincerely

Team Chairperson

# Publicity



**Media involvement.**  
*Planning weekend Host, developer John Muir, makes his case to the television cameras (Blairs College, Aberdeen 1994).*

Publicity is an essential aspect of an Action Planning event in order to generate a public debate.

## PRINCIPLES

- Publicity is needed:
  - Before** – to generate excitement and ensure participation;
  - During** – to maintain momentum and disseminate the results;
  - After** – to monitor progress and ensure action is taken.
- The local media should be involved as participants in the process as well as observers. It is a rare opportunity for the media to play a part in generating community solutions rather than simply reporting problems.

## TIPS

- Time the event to coincide with a political opportunity or a community event to provide added media attraction (but avoid distractions, eg World Cup).
- Put one person in charge of media liaison as part of a general information HQ.
- Maintain a comprehensive press kit explaining the issues and process. This can be the briefing pack (see page 45) with the addition of press releases on newsworthy developments and details of activities particularly worth covering.
- Try and get a special pull-out supplement in an established local newspaper. In addition produce a broadsheet including the programme.

*“The public is eager for participation, elected councils are searching for new direction. Is Action Planning the missing ingredient?”*

**John Worthington,**  
**President,**  
**Urban Design Group.**  
*Urban Design Quarterly,*  
January 1994.

- Hold a press conference prior to the event and show videos or slides of previous events. Invite the media to take part throughout but particularly for tours, briefings and presentations.
- T-shirts, badges and banners can all be useful.
- Encourage local organisations to help with publicity by, for instance, writing letters to the local paper.
- Maintain a clippings file of coverage.

**Creating a public debate.**  
 Making the future of people's immediate environment news is an essential part of Action Planning. (Birmingham Post, 1988; Pittsburgh Press, 1988; Sunday Telegraph, 1989; Dorset Advertiser, 1989; Architects' Journal, 1990; Guardian, 1990; Southwark Sparrow, 1993; Shankill People, 1995 (a 36-page special issue prior to a planning weekend).



# Venues



**On location.**

*Marquee used for workshops, and an exhibition because no large hall was available on site (Poundbury Planning Weekend 1989).*

*“Action Planning events can change the way we plan because you focus on the area, you are in the area when you focus on it and you involve the people with a particular interest in seeing the area come to life. Normally you would be in an office framework, divorced from the site, and not in contact with the community that will be living in the environment that you create.”*

**Charmaine Young,**  
**Housing Developer,**  
**Wimpey Homes,**  
December 1993.

Premises which provide a stimulating atmosphere are essential. Four main types of space are required:

- 1 **Studio workspace** for the Team and organisers with lockable administration room, kitchen and toilets. 24-hour access essential.
- 2 **Large hall** for public meetings, presentations and exhibitions with toilets and refreshment facilities.
- 3 **Medium-sized rooms** for workshops, group meetings and a creche.
- 4 **Living accommodation** for Team members and organisers.

Ideally these should be next to one another and within, or close by, the area being studied.

- TIPS**
- Prominent venues on ‘neutral ground’ work best. Vacant shopfronts and schools can be ideal. Avoid town halls. Check venues are available for the whole period.
  - It helps if all Team members and other key participants stay in the same place, preferably a good hotel with individual rooms (as people may sleep at different times). Late night bar and breakfast discussions can be very productive. Accommodation within easy walking distance will avoid endless logistic problems.
  - Quiet outdoor space can be useful for workshops in warm weather.

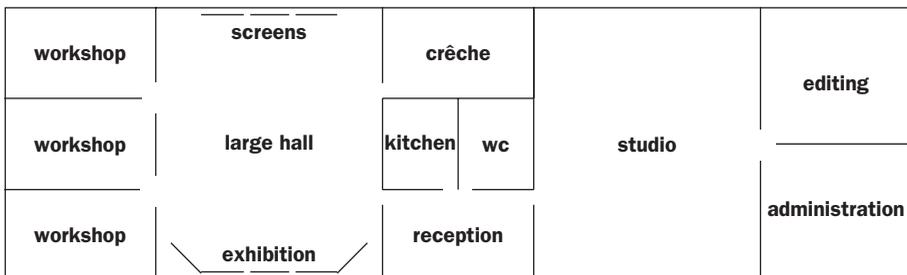
**Flexible space.**

Six workshops taking place simultaneously in a large hall. The same space was used for public meetings, presentations and Team working. (Hulme, Manchester, 1992.)



## Good Room Arrangement

Room layout one might arrive at if specifying in the abstract. In practice one has to improvise with spaces available.



# Fittings and services



## **Workstations.**

*Flat-bed photo-stand used for photographing drawings and other artwork.*

*Below: Computers are used for making signs, leaflets, broadsheets and reports, as well as storing names and addresses. (West Silvertown, 1993).*

*“The community planning weekends were brilliant. People could really get to talk to somebody and get a straight answer. There was a nice atmosphere.”*

**Joan Maginn,**  
**Chair, North Hull**  
**Residents' Association,**  
quoted in *Building homes*  
*people want*, 1994.

The venues need to be properly equipped and serviced if the event is to function smoothly.

## **PRINCIPLES**

- All work and domestic needs of the participants should be met for the duration of the event. People should be able to arrive empty handed and operate as efficiently, if not more so, than if they were in their own workplaces.
- Venues should be set up well before the Team arrives.

## **TIPS**

- Self service catering with a constant supply of hot drinks and nibbles works well so that people do not feel bound by fixed breaks. But dinner can usefully be more formal to provide a change of pace.
- Rapid photocopier and computer repair service is essential. If in doubt have spare machines.
- Make sure heating systems can be made to remain on overnight.



## Fittings

Checklist for large-scale event with a Team of 12. Adjust for smaller events.

### Studio Workspace

- Chairs (office) and stools.
- Computers (see Equipment & Supplies checklist p52 ).
- Desks for writing (6) and for computers (4).
- Drawing boards or drawing tables (8).
- Drinks facility and fridge.
- Lighting, including desk lighting.
- Lock-up for valuable equipment.
- Pin board or pin-up wall.
- Photocopier (see Equipment & Supplies checklist p52).
- Plan storage system.
- Power outlets.
- Shelving and filing space.
- Table (conference) with seats for 16.
- Telephones and fax.
- Waste bins and garbage bags.
- .....

### Large Hall

- Blackout curtains.
- Chairs – movable.
- Exhibition facilities.
- Flipchart (with non-squeaky pens).
- Lighting (friendly),
- Projection screens (2 large).
- Public address system with microphones on stands and roving.
- .....

### Medium-sized rooms

- Chairs – movable.
- Flipcharts.
- Pin board and pin-up space.
- Table.
- .....

## Services

Checklist for large scale event. Adjust accordingly.

- Caretaking/reception to provide security for equipment: 24-hour.
- Catering: breakfast at hotel, buffet lunches, set dinners in a variety of venues, constant supply of hot and cold drinks, fruit and nibbles.
- Computer support (rapid, 24-hour cover on final night).
- Film processing: rapid throughout, 2-hour turnaround on final day for colour slides (mounted), 6-hour turnaround for black & white and colour prints (3ins x 5ins).
- Photocopier and computer repair service: rapid, 24-hour cover.
- Printers: briefed well in advance of scope of work and importance of deadlines.
- Telephone lines: two minimum.
- Transport: minibuses or coaches for Team tours and travel to evening dinner venues.
- .....
- .....
- .....

# Equipment and supplies

A substantial amount of equipment is required to run an Action Planning event successfully.

## Team Members' Luggage

- Smartish clothes for the start and finish.
- Casual clothes for the working sessions.
- Camera.
- Useful general facts and figures or illustrative material likely to be relevant.
- Material for special presentation if required.
- Any special favourite drawing pens.
- .....
- .....
- .....

### PRINCIPLES

- Support bodies may well have much of the equipment. Otherwise it will have to be borrowed, hired or bought.
- Equipment and supplies should be organised well in advance.
- It is better to over-provide than run out. Arrangements should allow for returning or reusing any surpluses.

### TIPS

- Discourage mobile phones in the working sessions but they can be useful for dealing with press enquiries, suppliers and emergencies.
- Agree and standardise computer software. Prepare standard layout formats beforehand.
- Banners for the entrance, the main hall and workshops can usefully be prepared in advance.

*"A successful event has to be as carefully stage managed as a theatre production – but one in which the audience and actors keep reversing roles."*

**Debbie Radcliffe,**  
**Actress and Team member,**  
February 1995.

## Equipment and Supplies

Checklist for large-scale event. Adjust accordingly.

- Banners and directional signs with fixings.
- Base maps and plans of the area at different scales.
- Blackboard and chalk.
- Base model with movable parts.
- Bluetak.
- Box files.
- Camera: (35mm) with wide-angle, telephoto, flash and close-up facility.
- Camera: Polaroid (for last-minute shots).
- Cardboard or polystyrene (for modelmaking).
- Catering gear: cups, plates, cutlery, napkins etc.
- Clipboards.
- Cocktail sticks (for use with model).
- Computers: 4 networked. One main server machine. Laser printer. Scanner if possible. DTP and word processing software. Discs and toner for printer.
- Compasses.
- Correction fluid.
- Cutting knives, mats, metal edge and spare blades.
- Dictating and transcribing equipment.
- Drawing pins, stick pins.
- Easels.
- Extension cables.
- Erasers.
- Filing trays.
- Film: colour slides for presentation, colour or black & white prints for report (20 rolls each).
- Film projector and screen (if relevant).
- Flat-bed photo-stand with colour corrected lamps (for shooting drawings and plans) and spare bulbs.
- Flipcharts.
- Food and drink.
- Hole punches.
- Layout pads (grid marked with non repro blue ink).
- Light box (large).
- Name badges (essential throughout).
- Paper: A4 & A2 sketch pads; A4 writing pads (lined); tracing (white and yellow); A5 note pads; flipchart pads.
- Paperclips.
- Paper trimmer or guillotine.
- Pencils: normal; coloured.
- Pens: felt-tips in bright colours and grey tones (different sizes); fiber-tipped with medium and fine tips (black and red); ball points (black and red); technical drawing (1 set); highlighters.
- Photocopier with enlarging/reducing facility (with rapid repair service).
- Photocopier paper, toner etc.
- Pointer for slide show.
- Post-its (different sizes and at least 4 colours).
- Pritt-sticks.
- Ring binders (A4).
- Rubber bands.
- Rubber cement.
- Rubbish bags.
- Rulers and scale rulers.
- Screen for copying photographs.
- Scissors.
- Slide projectors (carousel type) (2), with screens (2) and spare carousel trays (6), spare fuses and spare bulbs.
- Spraymount adhesive.
- Staples and staple extractors.
- Tape: masking, magic, heavy duty.
- Tape recorder and tapes.
- Toilet paper.
- T-squares, triangles and circle templates.
- Velcro pads.
- Video camera.
- Video play-back equipment (if relevant).
- .....
- .....
- .....



**Team arrival.** John Thompson and Team members disembark at Aberdeen airport for a 5-day planning weekend at Blairs College, 1994, complete with boxed 'flat-bed photo-stand' as hand luggage!

## Section 4

# The Event

|                   |    |
|-------------------|----|
| Timetabling       | 56 |
| Sample timetable  | 58 |
| Briefing          | 60 |
| Topic workshops   | 62 |
| Design workshops  | 64 |
| Meals and leisure | 66 |
| Report production | 68 |
| Sample reports    | 70 |
| Presentation      | 72 |

# Timetabling

*Opening Event*  
**Social Evening**

*Food! Drink! Fun!*  
*Entertainment!*

**Thursday 19th November**  
6.30pm–9.30pm

Come along and meet everyone that will be involved in the Weekend. Find out how you can help to redesign the heart of Hulme. See how the same process has helped other communities from Pittsburgh, London's East End to Moscow...see the exhibition...

**What's important to you?**

*Come and share your ideas with us and enjoy some of Hulme's best entertainment!*

**Launch.** Part of a leaflet circulated before an event (Hulme, Manchester, 1992).

*"The participation of citizens in almost every aspect of the process is its key to success. The process provides a structured approach through which citizens, politicians and professionals can speak and listen to each others' concerns and ideas and raise the consciousness of the community."*

**American Institute of Architects,**  
*R/UDAT Handbook, 1992.*

Skilful and imaginative timetabling is the key to organising successful Action Planning events.

## PRINCIPLES

- The length of an event should be determined by the complexity of the issues and the resources available but the structure will be similar in most cases. Longer events normally span a weekend to allow both professionals and locals to get involved easily.
- Events are made up of a series of presentations, workshops, visits, public meetings, working sessions and social events. Some of these will be open to everyone, others will be for specific groups only.
- The timetable should be determined and circulated well in advance so that people can fix it in their diaries and prepare themselves.

## TIPS

- Short events – 1 or 2 days – may be useful for relatively simple issues or small areas but don't expect to be able to deal with all of the problems of a city or neighbourhood in that time. Experience shows that events lasting 4 or 5 days are necessary for people to learn to work together effectively and think through the issues.
- Don't let the timetable inhibit spontaneous enthusiasm. The Chairperson should allow some 'unstructuring' and flexibility when possible.
- Allow plenty of time for relaxed meals; both buffet and sit-down. Meals are a good opportunity for speakers from local groups and for discussion.

- Allow time for Team discussion on process; ie 'how to work as a team'. Encourage people to share their 'learning moments'.
- Keep people healthy by encouraging walking, swimming, and so on, preferably in groups. An intensive pace is essential but pushing people too hard can be counterproductive.

## Timetable Structure

Note the common format regardless of length. Adjust to suit circumstances.

|                          |                 | <b>5-Day Event</b>   |                            | <b>1-Day Event</b>   |
|--------------------------|-----------------|--|----------------------------|--|
| <b>INTRODUCTION</b>      | <b>Thursday</b> | Tour of area for Team members.<br>Briefings from key players.<br>Launch event.   | <b>Morning Session 1</b>   | Introductions.<br>Briefings from key players.<br>Coffee.         |
| <b>PROBLEMS ISSUES</b>   | <b>Friday</b>   | Open topic-based workshops to identify key problems and opportunities.           | <b>Morning Session 2</b>   | Discussion/analysis of key problems and opportunities.<br>Lunch. |
| <b>SOLUTIONS OPTIONS</b> | <b>Saturday</b> | Open design workshops to explore future options.<br>Team brainstorm over dinner. | <b>Afternoon Session 1</b> | Design sessions to explore future options.<br>Tea.               |
| <b>SYNTHESIS</b>         | <b>Sunday</b>   | Team analysis and determination of strategy.<br>Report writing and drawing.      | <b>Afternoon Session 2</b> | Drafting of notes on conclusions and next steps.                 |
| <b>PRODUCTION</b>        | <b>Monday</b>   | Report and slide show production.<br>Exhibition/presentation to public meeting.  | <b>Afterwards</b>          | Production and distribution of report.                           |

# Sample timetable **5-Day Event Spanning Weekend**

| <b>DAY 1</b>  | <b>THURSDAY</b>  | <b>DAY 2</b>  | <b>FRIDAY</b>  |
|---------------|--|---------------|--|
| 8.00 - 12.00  | <b>Setting up.</b><br>Room arrangements.<br>Delivery of equipment and supplies. Erection of banners and signs. | 9.00 - 10.00  | <b>Team briefing and preparation.</b>  |
| 12.00 - 13.00 | <b>Team assembles.</b>   | 10.00 - 11.00 | <b>Setting the scene.</b><br><i>Presentations by local interests.</i>  |
| 13.00 - 14.00 | <b>Buffet lunch.</b><br>Welcome by hosts, sponsors etc.  | 11.00 - 17.00 | <b>Topic workshops.</b><br><i>Open to all, punctuated by lunch and tea breaks. Several parallel topic-based groups, ending with a plenary report back.</i> |
| 14.00 - 16.00 | <b>Reconnaissance.</b><br>By Team of area by bus/train/plane/foot.   | 17.00 - 18.00 | <b>Team review.</b><br>Detailed problem definition.  |
| 16.00 - 17.00 | <b>Political briefings.</b><br>By local politicians.   | 18.00 - 20.00 | <b>Breather.</b><br>Minute writing, reading, exercise.   |
| 17.00 - 18.00 | <b>Community briefings.</b><br>By local inhabitants.   | 20.00 - 22.00 | <b>Team dinner.</b>  |
| 18.00 - 19.00 | <b>Technical briefings.</b><br>By planners, engineers, developers etc.   | <b>DAY 3</b>  | <b>SATURDAY</b>  |
| 19.00 - 19.30 | <b>Team briefing .</b><br>By Chairperson on Team working processes.  | 9.00 - 10.00  | <b>Team briefing and preparation.</b>  |
| 19.30 - 22.00 | <b>Launch event.</b><br><i>Public meeting and/or dinner for Team, hosts and guests.</i>                        | 10.00 - 10.30 | <b>Report back on Day 2.</b>   |
|               |  | 10.30 - 12.00 | <b>Lessons from elsewhere.</b><br><i>Presentations by Team members.</i>  |

## Common Variations

- **Later start.** The American Institute of Architects favours a slightly shorter 4-day event: Team arrives Thursday evening for relaxed social. Reconnaissance and briefing on Friday morning. This can be more suitable for busy Team members.
- **Delayed presentation.** The final presentation can be delayed for a few days. But having longer to prepare has to be weighed against the loss of momentum and some participants.
- **Delayed report.** A popular option is to produce a broadsheet with a summary for the final presentation and for a small editorial team to complete the report over the next few days.

|               |   |               |  |
|---------------|---|---------------|--|
| 12.00 - 17.00 | <b><i>Design workshops.</i></b><br><i>Open to all, punctuated by lunch and tea breaks and ending with a plenary report back. In parallel groups of 10-15.</i> | <b>DAY 5</b>  | <b>MONDAY</b>  |
|               |   | 07.00         | <b>Printers deadline.</b><br>Report and/or broadsheet to printers.   |
|               |   | All day       | <b>Presentation preparation.</b><br>Slide selection.<br>Exhibition mounting.<br>Hall arrangements.                               |
| 17.00 - 18.00 | <b>Team review.</b><br>Developing central themes.   |               |  |
| 18.00 - 19.00 | <b>Breather.</b><br>Minute writing, reading, exercise.  | All day       | <b>Clearing up.</b><br>Tidying up, packing equipment and surplus supplies when finished with.                                    |
| 19.00 - 23.00 | <b>Team brainstorm dinner.</b><br>Imaginative solutions.  |               |  |
|               |   | 12.00         | <b>Colour slides deadline.</b><br>Final film development.  |
|               |   | 17.30         | <b>Press briefing.</b>   |
|               |   | 19.00 - 21.00 | <b>Public presentation.</b><br><i>Slide show followed by discussion and formal thanks. Distribution of report or broadsheet.</i> |
|               |   | 21.00 - 23.00 | <b>Farewell social event.</b>  |
|               |   |               |  |
| <b>DAY 4</b>  | <b>SUNDAY</b>   |               |  |
| 10.00 - 11.00 | <b>Team preparation.</b>  |               |  |
| 11.00 - 12.00 | <b>Team editorial meeting.</b><br>Report and slide show structure.<br>Production strategy.  |               |  |
| 12.00 onwards | <b>Report and slide show production.</b><br>Writing, editing, drawing, slide making. Review meetings as necessary.<br>Team only. Sleep and eat as and when.   |               |  |

## Warning

Sample timetable not to be treated as a blueprint. Modify to suit local conditions.

## Public Sessions

Sections in italics are advertised as being open to the general public. The remainder are for certain groups only. Normally the Team, organisers and technical support will be present throughout. Advisors will normally be present until the end of Saturday. In practice, events usually have an 'open' feel and people can participate as much as they wish at the discretion of the Chairperson.

# Briefing



## **Briefings.**

*By local residents and specialists (Southampton, 1985; Poundbury, 1989).*

*"The basic notion is to get ideas which come out of the community's guts rather than ones which are imposed on them by remote authorities."*

**Patrick Harrison,**  
**Secretary,**  
**Royal Institute of**  
**British Architects,**  
*Architects' Journal,*  
14 March 1984.

Action Planning events start with activities designed to provide the Team with a comprehensive overview of the locality and issues being dealt with. These normally include a physical reconnaissance and a series of short presentations.

## **PRINCIPLES**

- Presentations should be made by all the main players so that the Team gains a rounded perspective; eg politicians of different persuasions, community groups, planners, landowners.
- Locals should take part as guides on the reconnaissance but the Team Chairperson should direct it to avoid it becoming a public relations exercise for sectional interests.

## **TIPS**

- Presentations should be short sharp overviews. Don't let people waffle on and monopolise the time.
- Some people may prefer to say a few words during a meal break rather than in a formal meeting and this provides variety and interest.
- Tape record presentations for later use. Keep names and phone numbers of contacts who may be helpful.
- Viewing from a hill, high tower or helicopter/light plane is particularly useful.
- Everyone should wear name badges and introduce themselves as much as possible.



**Reconnaissance.**

Viewing from the air, from an open-top bus and on foot. (Pittsburgh, USA, 1988; West Silvertown, London, 1993; Blairs College, Scotland, 1994.)

# Topic workshops



**Menu.**

*Facilitator for a workshop on economics spells out the ground to be covered (Blairs College, 1994).*

*“It was one of the very few occasions when you had the opportunity to see all the people who would be involved in something like that at the same place at the same time, and actually discussing things without discussing them behind closed doors in small groups. So it was a far more open process than you would get in any normal circumstance.”*

**John Barnard,  
Acting Chairperson,  
Barnwood Court Tenants  
and Residents Association,  
December 1993.**

Topic workshops are a way of creating a relaxed environment for exchanging information and identifying key issues. They usually take place in the early stages after the briefings.

**PRINCIPLES**

- Participants are allocated to (or choose) a workshop. Each workshop will normally deal with a different topic; eg housing, transport, ecology. Team members are distributed evenly according to their expertise. Groups may vary in size but 10 – 12 is a good number to aim at.
- Each workshop needs a facilitator, notetaker, mapper (who marks points on a map or plan) and storyboarder (who summarises key points on a flipchart).
- A plenary session is held at the end where one person from each workshop (preferably a local person) reports briefly on the outcome.

**TIPS**

- There are many ways of running workshops. One way to start is to get everyone to write on post-its 3 things right and 3 things wrong with the present situation. Then sort into categories and review. Simple rules (eg no personal criticism) can be useful and should be displayed. Encourage Team members to take a back seat and let locals take the lead.
- Write up reports immediately to inform the next link in the chain. Use bullet points under standard headings: ‘Who attended’; ‘main issues’; ‘proposals’.
- Keep attendance lists for reference later.

## Sample Workshop Brief

Topic area: eg 'Housing' or 'Transport'

1. What's wrong with existing situation?
2. What's right with existing situation?
3. What do we want (best hopes)?
4. How do we get there?



## Topic Workshop Props

- Banner with workshop title.
- Large maps, aerial photos, etc.
- Pin-up area.
- Rules (if any).
- Pens or pencils (for all participants).
- Felt-tip pens (for storyboarding).
- Post-its (4 different colours).
- Flipchart.
- Notepads.
- Workshop brief.
- Standard report form.
- Attendance sheets (name, address, organisation if any).



## Facilitation Tips

- Introduce yourself and get others to do likewise.
- Introduce session format. Ensure everyone understands task in hand.
- Steer discussion to ensure progress.
- Ensure everyone has chance to speak.
- Deal with any conflict.
- Wind up with summary of conclusions and next steps.



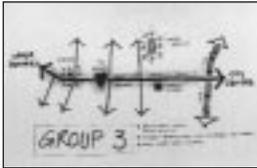
**One method.** Participants put their views down on post-its, which are sorted on a wall chart. The results are then discussed with key points recorded on flipcharts.  
(Top and centre: Blairs College, 1994.  
Bottom: Worrington Green, 1989.)

# Design workshops



**Summing up.**

*Participant explains workshop conclusions to a plenary session (Angell Town, Brixton, 1993).*



**Output.**

*Summary drawing of one workshop's proposals (Shankill, 1995).*

*"The thing that got us about the weekend is that it showed that a hands-on approach to consultation really works."*

**Justin Wilson,**  
resident,  
West Silvertown,  
December 1993.

Design workshops provide a 'hands-on' technique for allowing groups of people to work together creatively on physical planning and design. They normally take place after the main issues have been identified in topic workshops.

**PRINCIPLES**

- People work together in groups around a large map or model. Different groups can deal with different areas or the same area at different scales. Groups can vary in size (10 – 12 a good average to aim at).
- Everyone is encouraged to develop their ideas by drawing or making adjustments to the model. Each group needs a facilitator, a note-taker and a mapper (who marks points on a map or plan).
- At the start of the session, participants should choose which group to attend with Team members distributed evenly.
- A plenary session should be held at the end where each group reports the results.

**TIPS**

- Using felt-tips and tracing paper is often more suitable than using models because little preparation is needed. On the other hand flexible cardboard models can be very useful for helping people to visualise in three dimensions, and making a model beforehand can itself generate interest and enthusiasm. The 'Planning for Real' method can be particularly useful (see page 93).
- Get everyone to sign drawings at the end and draw up a tidy version for presentation.



## Design Workshop Props

- Base maps.
- Tracing paper.
- or:**
- Base model with movable parts.
- Spare cardboard or polystyrene.
- Scissors.
- Post-it notes and cocktail sticks.
- and:**
- Coloured pens (different colours).
- Attendance sheets.
- Site photographs.



**Hands-on.** Residents and Team members develop design ideas using felt-tip pens and tracing paper laid over a base plan. (Angell Town, Brixton, 1993; West Silvertown, 1993; Pittsburgh, 1988.)

# Meals and leisure



## **Doodling.**

*Sketch on paper tablecloth, made during a Team dinner, which was used in the final report and exhibition (Blairs College, 1994).*

*"A bond was created between us. It was like sailing through the bay of Biscay in a great storm. I will be sad to leave. I had a very very good time. Buildings can be more economic if you know who you are building for. I hope very much that I can continue this work in Germany."*

**Karin-Maria Trautmann,**  
**Partner,**  
**Trautmann Real Estate,**  
**Berlin,**  
London, December 1993.

Mealtimes and other breaks can be made into a valuable part of the creative process as well as being therapeutic.

## **PRINCIPLES**

- Mealtimes should be stage-managed to ensure maximum opportunities for informal and formal discussion.
- Leisure activities should be built into the event timetable to provide exercise, inspiration and opportunities for some social interaction and networking.

## **TIPS**

- Invite local political, business and community leaders to meals which can end with brief speeches and debate.
- Organise dinners in a variety of inspiring local venues.
- Ensure that paper tablecloths are provided so that people can sketch on the tables during meals.
- An after dinner 'brainstorm' can be very stimulating, especially prior to the main Team editing session. Ask everyone to respond to 2 questions: 'What have you learnt in the past few hours/days?' and 'What are you going to do with it?' Have a flipchart at the ready.
- Saunas, swims, jogs, walks and a late night bar can all be productive.



**Brainstorming.** Hilltop Team breather, and dinner for Team and guests, prior to settling down to report production (Poundbury, 1989 and Blairs College, 1994).

# Report production



**Division of labour.**  
*Report production roles*  
(Poundbury, 1988).



**Editing suite.**  
*Wall mounted storyboards*  
*allow everyone to keep*  
*track of progress* (West  
Silvertown, 1993).



**Drawing.**  
*Working up design details*  
(Berlin, 1995).

The quality of the report of the event will be instrumental in determining what happens next.

## PRINCIPLES

- The report is a collective document of the entire Team. Who contributes what is not important. The aim is to clearly convey the Team's proposals and the rationale behind them.
- The report should be capable of wide distribution and of having a long shelf-life; it may be needed to reignite action in ten years time.
- The report should be completely assembled during the event and either printed in time for the final presentation or printed a few days later with a broadsheet produced in the meantime.

## TIPS

- A streamlined editing process is essential to produce the report in the time available. Establish clear editorial deadlines and responsibilities. It may be worth having a professional editorial team.
- Adopt a report structure and format at the outset, modifying them later if necessary. Stick to the main issues and be concise. Lengthy reports are unlikely to be read and are too expensive to circulate (1000 copies are normally needed).
- Assemble the report by pinning copies of text and illustrations on wall mounted storyboards. Keep originals in a binder. Get locals to proof-read to avoid misspelling names. Get Team members to sign the top copy of the report if there is any chance of controversy.

## Sample Report Structure

### Executive Summary

#### Introduction

Why the weekend was organised.  
What happens next.

#### Background

Present realities, facts and assumptions.

#### Issues

Main problems and opportunities analysed.

#### Recommendations

What should be done (short & long term).  
Who should do it.

#### Credits

Team members, sponsors,  
participants etc.

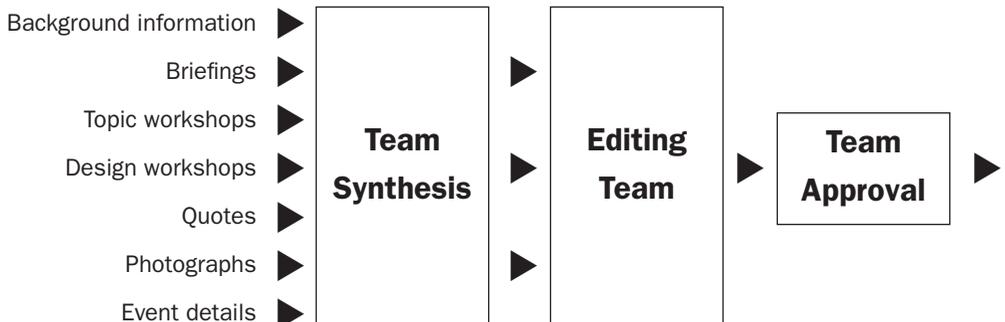
#### Sources and notes

## Collecting Information Hints

- Three types of information are of most use; statements, quotes and images.
- Keep the report structure in mind when collecting information; ie everything should relate to a particular report section.
- Keep statements to brief bullet point paragraphs with one or two word headings.
- Record general identity of people quoted (eg 'tower block resident') or name and position in which case check it with them before using.
- All copy should have the following information at the top of each page: Originator's initials, typists initials, date, time.

## Information Flowchart

How information is collected, synthesised and edited for the report



# Sample Reports

Published reports are the normal way of refining and disseminating the recommendations arising from an Action Planning event, together, perhaps, with a broadsheet. Here are some examples of style and content taken from events on both sides of the Atlantic.



**Examples from events in:**

- Anderson, Indiana, USA, 1985.
- Pittsburgh, USA, 1988.
- Theatre Village, Newcastle, 1988.
- Poundbury, Dorset, 1989.
- Wood Green, London, 1990.
- Kings Cross, London, 1990.
- Hulme, Manchester, 1992.
- Helena, USA, 1992.
- West Silvertown, London, 1993.
- Burgess Park, London 1993.
- Greater Shankill, Belfast, 1995.

**Varied report formats.** From left to right: 24-page A4 printed document; 32-page newspaper; 122-page A4 photocopied spiral-bound document; 80-page A4 report on newspaper.



# Presentation

**Monday Evening**  
8.00pm

## Report Back

The team will be working flat out on Sunday and Monday to turn all the ideas into a Vision for the future

**See what you have helped create!**

Exhibition • Slide Show

**Don't miss it!**

### **Deadline!**

*Part of an event leaflet (Blairs College, 1994).*

*"When I came in this evening I was struck by the sheer amount of creative energy and felt a sense of personal loss that I was not here for all of it."*

**David Lunts,**  
**Councillor,**

Final presentation,  
Hulme, Manchester, 1992,  
quoted in event report.

One of the most exciting and nerve wracking moments of an Action Planning event is the final presentation.

## PRINCIPLES

- The purpose of the presentation is for the Team to present its proposals to the community and then to bow out, leaving the community equipped to take the process forward if it wishes.
- The presentation should be a public event with all those who have been involved particularly encouraged to attend.
- The timing of the presentation is fixed and advertised in advance to provide a deadline which cannot be avoided.

## TIPS

- A good format is a slide show, preferably with 2 screens (to show before and afters) given by the Team Chairperson.
- Create an exhibition round the walls using flipchart sheets, post it panels, and other material from the event.
- After the show, get all Team members to sit up front, say a few words and answer questions.
- Conduct an exit poll to gauge the audience's immediate response.
- Make sure the acoustics are good.

## Sample Slide Show Structure

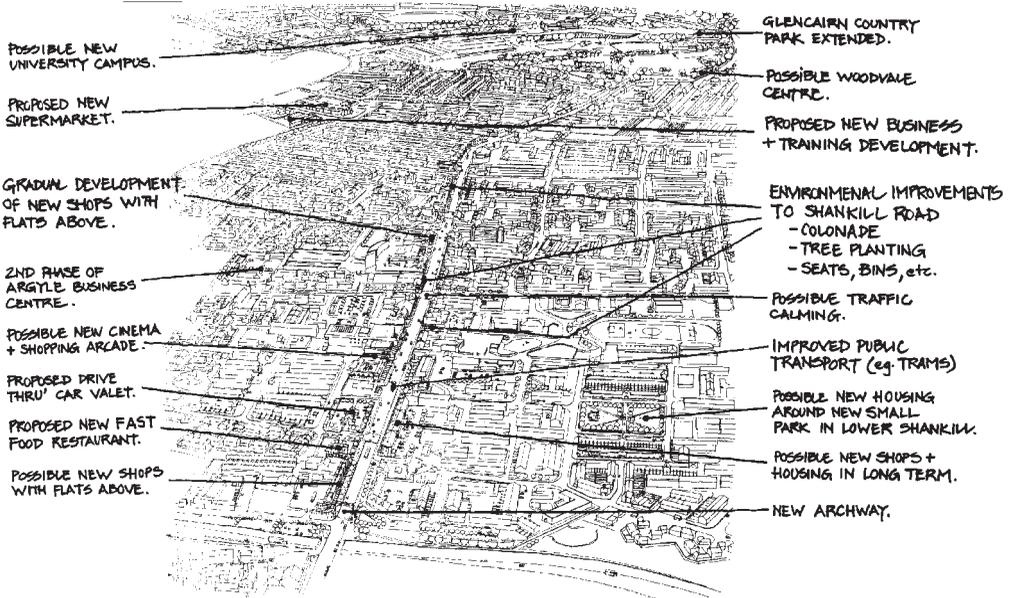
- 1 Brief history of the area covered.
- 2 Description of the Action Planning process.
- 3 Terms of reference for the event.
- 4 Run through of the event process on a day-to-day basis with conclusions drawn out at each stage.
- 5 Vision of what proposals could look like.
- 6 Summary of main recommendations.



**Team work.** *Sorting slides invariably takes place right up to the last moment (Poundbury, 1989).*



**Reporting back to the community.** *Exhausted Team members and hosts (front row) prepare to take the flak (or praise) at a public slide presentation of their proposals at the end of an Action Planning event (Poundbury, 1989).*



**GREATER SHANKILL**  
A QUALITY ENVIRONMENT IN WHICH TO LIVE, WORK AND PLAY

*Dream or reality? Overall vision arising out of the Greater Shankill Community Planning Weekend, Belfast, 1995.*

## Section 5

# Follow-up

|            |    |
|------------|----|
| What next  | 76 |
| Evaluation | 78 |

# What next

The Action Planning process does not finish at the end of an event. What happens next is vitally important to ensure that the proposals are acted upon.

## PRINCIPLES

- Commitment to follow-up should be built into the process from the beginning and funding allocated.
- The nature of the follow-up will vary depending on local conditions (see box right).
- A definite programme and organisational mechanisms for follow-up should be included in the event report and announced at the presentation. There should be achievable targets and clear responsibilities.
- The local Steering Group, modified as appropriate, should normally take the lead.

## TIPS

- Ensure that follow-up is the responsibility of more than one individual, preferably a local committee. Don't leave it all up to the Team Chairperson.
- Make the follow-up formal and publicise the results.
- Keep good records. Keep all videos, slides, tapes and press coverage of the event and send copies to suitable national bodies. Ensure that the event report is kept in print.
- Change the membership of the Steering Group but keep some continuity.

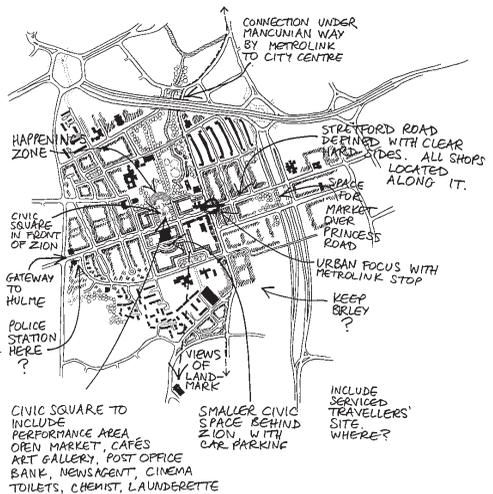
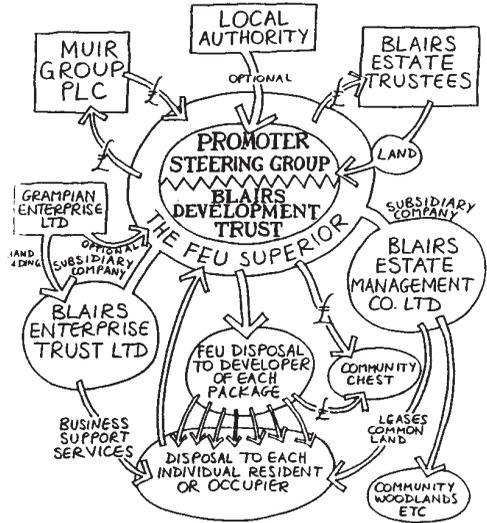
*"The process demonstrated that urban planning and design issues can be clarified and defined in a very short period of time and involve extensive and direct community participation. With continuing fine-tuning and staff resource support, it is possible to move this programme from its pilot status and incorporate it formally into the City's planning processes."*

**Kenneth Topping,**  
**Director of Planning,**  
**Los Angeles,**  
 Report, 1 November 1990.

## Follow-up Methods

- Implementation workshops**  
Organised by the Steering Group on a regular basis to monitor progress.
- Team debriefing**  
Perhaps 4-6 weeks after the event. Handful of Team members only if heavy travel costs involved. Evaluate event and assess next moves. Preferably in the host community.
- Annual evaluation meeting**  
Organised by Steering Group or others. Good for maintaining momentum.
- Team revisit**  
Handful of Team members revisit to:
  - a) Learn of achievements;
  - b) Offer additional suggestions;
  - c) Prepare an evaluation report.
 Six months to one year after the event and then periodically at intervals. Visits can be formal or informal.
- Newsletter**  
Distributed on a regular basis with updated information on progress.
- Report reviews**  
Special meetings can be set up to run through the report with community leaders.
- .....

## DEVELOPMENT PROCESS FOR URBAN VILLAGE AT BLAIRS



**Ways forward.** Diagram of proposed development process, and sketch showing urban design proposals, both drawn up at Action Planning events and included in the event reports. (Blairs College, Aberdeen, 1994 and Hulme, Manchester, 1992).

# Evaluation



**Implementation.**

*Sketch showing environmental improvements to a public open space, made at an Action Planning event, which have since been partially carried out (Southampton, 1985).*

*“The Wood Green event was an example of the new collaborations that are emerging....Our thinking on Wood Green and Alexandra Palace has been greatly enriched. Equally importantly, the enthusiasm both of Councillors and officers has been fired anew.”*

**Nicky Gavron,  
Chairperson,  
Environmental Services,  
London Borough of Haringey,**  
quoted in event report, 1990.

Evaluating the impact of Action Planning events is important both to help focus attention on long-term objectives and help improve the process. Start thinking about evaluation from the outset.

It will always be difficult to be absolutely certain that any change resulted directly from an event but do not be afraid to make an assessment.

The form opposite is designed to assist you evaluate an event. Try copying and completing it 1 week, 1 year, 5 years and 10 years afterwards. Get a range of people who participated to fill it in. Copies sent to the editor of this handbook would be much appreciated. Use extra sheets to elaborate but try and summarise in the space provided. Alternatively, make up your own form.

## Common Event Defects

- Poor administration.
- Lack of information at the outset.
- Lack of interest by key players.
- Lack of involvement of key officials or other sections of the community.
- Logistical failures of equipment or people.
- Raising expectations without providing a means for them to be realised.
- Too much social activity deflecting Team from delivering.
- ‘Noble champion’ factor; lack of true team working due to one person trying to do it all.
- Team members being distracted by other commitments and not pulling their weight.
- Inadequate media coverage.
- Lack of systematic follow-up.
- Lack of adequate lead time.
- .....

## Action Planning Event Evaluation Form

**Title of event**.....

Nature of event.....

Place.....

Dates of event..... Date of evaluation.....

Name, title and organisation of evaluator.....

Role at planning weekend (if any).....

Address .....

Telephone ..... Fax.....

**Summarise the impact of the event on the following:**

Physical environment (buildings, parks, transport, design standards).....

.....

Economy (work prospects, wealth).....

Perceptions and aspirations (self view, hopes).....

.....

Local organisations (changed roles, new partnerships).....

.....

The participants (members of the public, Team members).....

.....

**How could the event have been organised better?**

.....

**What would be your advice to other communities holding such an event?**

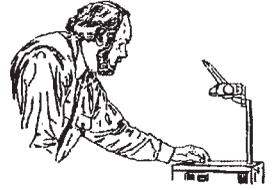
.....

**Any other thoughts.**

.....

.....

.....



**Work process.** Sketches from Hulme Planning Weekend, Manchester, 1992.

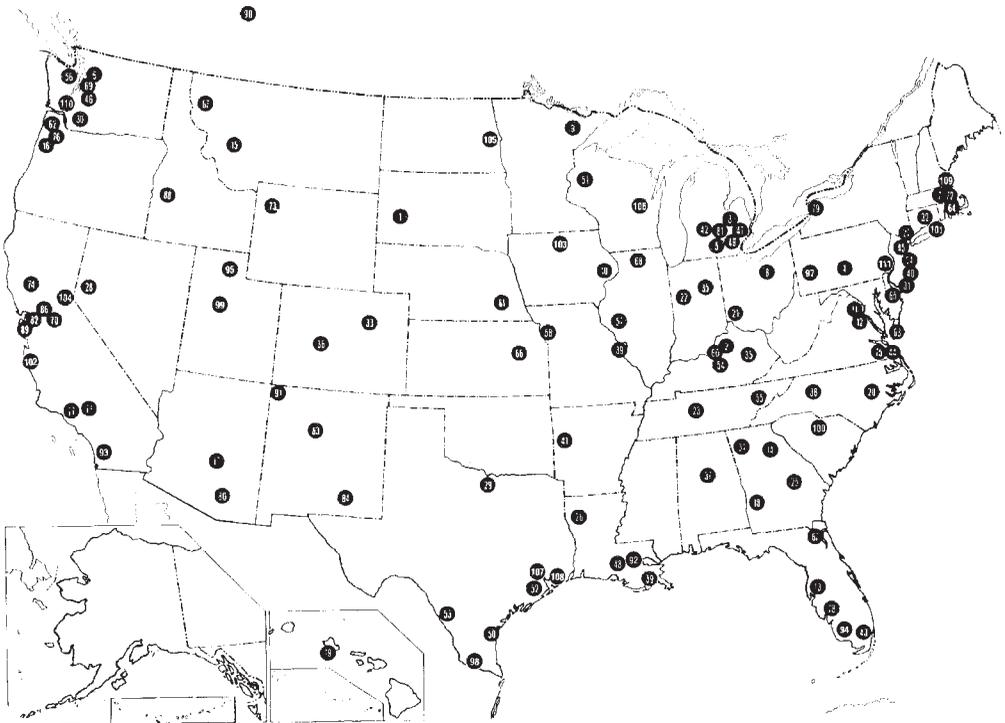
# Appendices

|                         |    |
|-------------------------|----|
| Potted history          | 82 |
| Publications            | 84 |
| Addresses               | 86 |
| Events listing          | 88 |
| Case studies            | 90 |
| Glossary                | 92 |
| Action Planning planner | 94 |

# Potted History

- 1967** American Institute of Architects (AIA) responds to citizen in Rapid City, South Dakota, USA and sends a team of architects to look at problems facing the community. Programme of Regional/Urban Design Assistance Teams (R/UDATs) launched by AIA with an average of five events organised each year. Process improved with each experience.
- 1978** Similar programmes start to be evolved locally in the USA at state level by universities and colleges and by local partnerships including local AIA Chapters. These become generally known as Design Assistance Teams (DATs) although programmes have different names.
- 1980** AIA starts Generic R/UDAT programme to deal with problems common to many communities. Three events are organised over the next five years.
- 1981** Planning Assistance Teams programme started by US Air Force using R/UDAT process during weekdays to examine planning issues relating to its bases. 125 events held over next 10 years.
- 1985** First UK pilot event organised in St Mary's, Southampton by the Royal Institute of British Architects. It is called a Community Urban Design Assistance Team (CUDAT). Attempts to start a similar programme and support service to the AIA fail to get off the ground.
- 1988** Birmingham's 'Highbury Initiative' introduces 'think tank' style events to the mainstream UK regeneration scene. Handful of UK practitioners and community leaders take part in a joint US/UK team for a Generic R/UDAT in Pittsburgh, USA. It is the largest event ever held and is visited by HRH The Prince of Wales. This leads to a handful of events in the UK organised independently by those who took part.
- 1989** First UK 'community planning weekend' held at Bishopsgate in London's East End. Duchy of Cornwall hosts 'planning weekend' at Poundbury, Dorchester.
- 1990** American Institute of Architects produces handbook encouraging others to provide organisational support frameworks at state and local level. Over 100 R/UDATs and several hundred DATs now been held throughout USA. Urban Design Group organises its first event at Wood Green, London.
- 1991** UK consultants team up with German group and organise a 'planning week' in Moscow. Urban Design Group organises week long 'UDAT' in Pereslavl Zalessky near Moscow.
- 1993** Business in the Community organises its first event at Burgess Park, London. Urban Villages Forum organises its first event at West Silvertown, London.
- 1994** Urban Design Group announces intention to mount UK support framework.

- 1995** Action Planning Task Group formed by handful of national organisations to coordinate promotion and support services. UK consultants organise events in the Shankill Road, Belfast and at Hellersdorf, East Berlin.
- 1996** *Action Planning* published by The Prince of Wales's Institute of Architecture.



**The American experience.** Over 125 4-day Action Planning events (R/UDATs) have been held throughout the United States under the auspices of the American Institute of Architects since 1967. Roughly half dealt with an entire city, a quarter dealt with the central area of a city and the remainder dealt with entire counties, neighbourhoods or open spaces. In addition there have been several hundred events organised independently at local level (not marked).

# Publications

A selection of material relating to Action Planning found useful in compiling this book.

Apart from some of the event reports, items can mostly be obtained from the sources shown in brackets or the organisations listed on page 86. Most material can be consulted at the library of The Prince of Wales's Institute of Architecture by arrangement.

## BOOKS & HANDBOOKS

***Building Homes People Want***; a guide to tenant involvement in the design and development of housing association homes, Pete Duncan and Bill Halsall, National Federation of Housing Associations, 1994. Includes case study of community planning weekend in Hull. (from NFHA, 175 Grays Inn Rd, London WC1X 8UP)

***Community Architecture***; how people are creating their own environment, Nick Wates & Charles Kneivitt, Penguin, 1987 (Polymath reprint 1996). Overview of movement for community participation in architecture and planning.

***Creating a Design Assistance Team for Your Community***; a guidebook for adapting the American Institute of Architects' Regional/Urban Design Assistance Team (R/UDAT) Program for AIA Components and Chapters, American Institute of Architects, 1990. Particularly useful for support bodies.

***Creating Involvement***; a handbook of tools and techniques for effective participation, Environment Trust Associates, 1994. Includes 2 case studies of community planning weekends. (from Environment Trust, 150 Brick Lane, London E1 GRU)

***Future Search***; an action guide to finding common ground in organisations and communities, Marvin Weisboard and Sandra Janoff, Berrett-Kohler, 1995. (from New Economics Foundation)

***The Guide to Effective Participation***, David Wilcox, Partnership Books, 1994. Overview of participation methods. (from Partnership Books, 13 Pelham Square, Brighton BN1 4ET)

***Making Microplans***; a community-based process in design and development, Reinhard Goethert and Nabeel Hamdi, Intermediate Publications, 1988.

***A Practical Handbook for 'Planning for Real' Consultation Exercises***, Neighbourhood Initiatives Foundation, 1995.

***Real Time Strategic Change***, Robert Jacobs, Berrett-Kohler, 1994.

***R/UDAT Handbook***; a guidebook for the American Institute of Architects' Regional and Urban Design Assistance Team (R/UDAT) Program, American Institute of Architects, 1992.

***Tools for Partnership-building***. How to build development partnerships between the public, private and voluntary sectors. In all central European languages and as a video. Compiled by Ros Tennyson. Prince of Wales Business Leaders Forum, 1994.

***Urban Design in Action***; the history, theory and development of the American Institute of Architects' Regional/Urban Design Assistance Teams Program (R/UDAT), Peter Batchelor and David Lewis, North Carolina State University School of Design and the American Institute of Architects, 1985. Classic work, currently out of print.

## MAGAZINES

***Urban Design Quarterly***  
(from Urban Design Group)

**No 28**, September 1988. Special issue on Action Planning issues.

**No 41**, January 1992. Reports of events in Russia.

**No 49**, January 1994. Special issue on Action Planning events titled 'Involving people in urban design'. Articles by: Steve Bee, Jon Billingham, Anthony Costello, David Lewis, Jon Rowland, Alan Simpson, John Thompson, John Worthington and Charles Zucker.

**No 58**, April 1996. Special issue related to Action Planning.

**THESES & RESEARCH PAPERS**

**Action Planning**, John Worthington, DEGW Group, 1992.

**A Community Participation Strategy in Urban Regeneration**; *case studies in Muirhouse and Greater Pilton, Edinburgh and Hulme – Moss Side, Manchester*, Michael Carley, Scottish Homes working paper, 1995. Includes highly informative account and evaluation of a planning weekend. (From Scottish Homes, Rosebery House, 9 Haymarket Terrace, Edinburgh EH12 5YA)

**Designing Livable Communities!** *the UDAT as an urban design process*, Jeremy Caulton, thesis for Joint Centre for Urban Design, Oxford Polytechnic, 1992. Useful study on the transferability of the Action Planning technique from USA to UK.

**Introduction to the Future Workshop Method**, Reinhard Sellnow, shortened translation for ECO 1, Moscow, 1991.

**What is a Community Planning Weekend?** John Thompson, John Thompson & Partners, 1995.

**EVENT REPORTS**

**A Case for Collaboration**; *report of the Miles Platting & Ancoats Action Planning Team, 26-28th January 1995*. (from Miles Platting Community Enterprises, 2 Bradford Road, Miles Platting, Manchester M40 7EZ)

**Cities don't just happen**, *Wood Green UDAT; report of the Urban Design Action Team*, London Borough of Haringey, 1990. Good example of slim publication capable of wide distribution.

**Blairs College Community Planning Weekend**; *a sustainable settlement for Grampian*, John Muir Group, 1994.

**Boise R/UDAT**, Central section Idaho chapter AIA, 1985.

**Central Avenue Study**, Albuquerque, New Mexico, R/UDAT report, 1984.

**Creating the new heart of Hulme**, Hulme Regeneration Ltd., 1992.

**ECO-1 International Community Planning Week**, European Academy of the Urban Environment, Berlin, 1992.

**Greater Shankill Community Planning Weekend**, Greater Shankill Partnership, February 1995.

**Internationaler Planning Workshop, Berlin – Hellersdorf**, WoGeHe, 1995.

**The Highbury Initiative**; *proceedings for the Birmingham City Centre Challenge Symposium, 25-27 March 1988*, DEGW/URBED (proceedings of September 1989 event also available).

**Imagine**, Anderson, Indiana, R/UDAT report, AIA, 1985.

**Last place in the downtown plan**, AIA R/UDAT team, report of R/UDAT in Portland, Oregon, 1983.

**The Newcastle Initiative**; *Theatre Village Study*, Royal Institute of British Architects Northern Branch, October 1988.

**Poundbury Planning Weekend**, Duchy of Cornwall, (report and appendices), 1989.

**Remaking the Monongahela Valley**, R/UDAT report, AIA, 1988.

**Report of the Burgess Park Urban Design Action Team**; *29-30 January 1993*, Business in the Community.

**St Mary Street, Southampton**; *CUDAT report*, Royal Institute of British Architects, 1985.

**Traffic management in Hastings Old Town**; *an agenda for action*, Dr Carmen Hass-Klau, Dr Graham Crampton and Nick Wates (eds), Hastings Urban Conservation Project and Hastings Old Town Forum, 1989.

**West Silvertown Planning Weekend**, Urban Villages Forum, 1993. Good example of comprehensive report using DTP.

# Addresses

Some contacts for further information and support on Action Planning.

## **American Institute of Architects (AIA)**

1735 New York Avenue, NW  
Washington DC 20006, USA.  
Tel: 1 202 626 7300 Fax: 626 7365.  
Contact: Charles Zucker.

Runs Regional/Urban Design Assistance Team (R/UDAT) programme as public service. Has samples of films, tapes, brochures and reports from US events. Supplies addresses of experienced Team members and local and state support programmes. Staff will visit and advise for travel expenses.

## **Association of Community Technical Aid Centres**

64 Mount Pleasant, Liverpool L3 5SD.  
Tel: 0151 708 7607 Fax: 708 7606.  
Represents national network of professionals providing technical support to local groups. Provides training, consultancy and publications.

## **Better Towns Group**

GKH-UDA 1, Design Works, Felling, Newcastle upon Tyne.  
Tel: 0191 495 2495 or 0191 281 6981.  
Contact: Gerry Kemp/Alan Simpson.  
Emerging national programme promoting community-led assistance teams in small towns. Provides technical support and funding for project development.

## **Business in the Community**

8 Stratton Street, London W1X 5FD.  
Tel: 0171 629 1600 Fax: 629 1834.  
Contact: Nick Thorn.  
National voluntary sector organisation promoting corporate community involvement. Its Professional Firms Group promotes Action Planning and acts as broker of professional services to events.

## **Centre for Development & Emergency Planning**

Oxford Brookes University, Gypsy Lane Campus, Headington, Oxford OX3 0BP.  
Tel: 01865 483413 Fax: 483298.  
Contact: Nabeel Hamdi.  
General information on Action Planning, particularly in developing countries.

## **Civic Trust**

17 Carlton House Terrace, London SW1Y 5AW.  
Tel: 0171 930 0914 Fax: 321 0180.  
Contact: Caroline Clark.  
Regeneration Unit promotes Action Planning and may provide assistance with events.

## **Community Matters**

8/9 Upper Street, London N1 0PQ.  
Tel: 0171 226 0189 Fax: 354 9570.  
National access point for community sector.

## **DEGW**

8 Crinan Street, London N1 9SQ.  
Tel: 0171 239 7777 Fax: 278 3613.  
Contact: John Worthington.  
Urban regeneration consultants with experience of Action Planning events.

## **Development Trusts Association**

20 Conduit Place, London W2 1HZ.  
Tel: 0171 706 4951 Fax: 706 8447.  
National umbrella organisation for community-based development organisations.

## **Directory of Social Change**

24 Stephenson Way, London NW1 2DP.  
Tel: 0171 209 5151 Fax: 209 5049.  
Publishes range of useful fundraising directories.

## **Institute of Advanced Architectural Studies**

University of York, The King's Manor, York YO1 2EP. Tel: 01904 433959 Fax: 433949  
Contact: John Worthington or Sultan Barakat (Post-war Reconstruction and Development Unit). Postgraduate institute of York University specialising in 'Briefing for Conservation and Development'.

## **John Thompson & Partners**

77 Cowcross Street, London EC1M 6BP.  
Tel: 0171 251 5135 Fax: 251 5136.  
Contact: John Thompson (formerly of Hunt Thompson Associates).  
Consultancy in architecture, urban design and community planning with considerable experience in organising Action Planning events for the public, private and voluntary sectors in the UK and Europe.

## **MATCH (Managing the Change)**

Knobelsdorff Strasse 10, D/14059 Berlin, Germany.  
Tel: 00 49 30 326 5012 Fax: 326 5214.

Contact: Andreas von Zadow (formerly of the European Academy of the Urban Environment). Networking European agency, committed to sustainable development, promoting Action Planning.

**National Council for Voluntary Organisations**

8 Regents Wharf, All Saints Street, London N1 9LR.  
Tel: 0171 713 6161 Fax: 713 6300.  
National access point for voluntary sector.

**Neighbourhood Initiatives Foundation**

The Poplars, Lightmoor, Telford, Shropshire TF4 3QN.  
Tel: 01952 590777 Fax: 591771.  
Information and advice on 'Planning for Real'.

**New Economics Foundation**

1st floor, Vine Court, 112-116 Whitechapel Road, London E1 1JE.  
Tel: 0171 377 5696 Fax: 377 5720.  
Contact: Perry Walker.  
Promotes community visioning, especially in the context of Local Agenda 21.

**Nick Wates**

13 Coastguard Cottages, Toot Rock, Pett Level, Hastings, East Sussex TN35 4EW.  
Tel/fax: 01424 813970.  
Editor of this handbook. Can provide consultancy on process management.

**Prince of Wales Business Leaders Forum**

5 Cleveland Place, London SW1Y 6JJ.  
Tel: 0171 321 6474 Fax: 321 6480.  
Contact: Ros Tennyson, Partnership Unit.  
Organises partnership capacity-building events worldwide with focus on Central Europe.

**Prince of Wales's Institute of Architecture**

14 Gloucester Gate, London NW1 4HG.  
Tel: 0171 916 7380 Fax: 916 7381.  
Contact: Nick Wates/Suzanne Gorman.  
Explores, teaches and promotes ways to improve the quality of the built environment. Publisher of this book. Can supply further copies; wholesale and retail. Promotes Action Planning through support of Tools for Community Design programme and coordination of Action Planning Task Group.

**Prince of Wales's Projects Office**

2 Hinde Street, London W1M 5RH.

Tel: 0171 224 1766 Fax: 224 1768.

Contact: Brian Hanson.

Coordinating agency for project development, community planning and vision processes. Organises annual European Urban Design Task Force.

**Royal Institute of British Architects**

66 Portland Place, London W1N 4AD.  
Tel: 0171 580 5533 Fax: 255 1541  
Contacts: Chris Church, Maureen Read.  
Community Architecture Group funds feasibility studies which may include Action Planning and co-ordinates Percentage for Participation campaign promoting user participation in building.

**Urban Design Group**

6 Ashbrook Courtyard, Westbrook Street, Blewbury, Oxfordshire OX11 9QA.  
Tel: 01235 851415 Fax: 851410.  
Contact: Jon Rowland/Susie Turnbull.  
National voluntary organisation that helps set urban design agenda. Organises lectures, workshops, seminars, conferences and study tours. Promotes Action Planning. Maintains list of professionals willing to serve on event Teams.

**Urban Villages Forum**

8 Stratton Street, London W1X 5FD  
Tel: 0171 629 1600 Fax: 629 1834  
Contact: Gail Hallyburton/Harriet Price.  
Campaigning organisation promoting urban villages; the planning and development of integrated, sustainable communities. Has worked with other organisations on planning weekends and can provide support for events. Maintains list of professionals willing to serve on Teams.

**URBED**

3 Stamford Street, London SE1 9NT.  
Tel: 0171 928 9515 Fax: 261 1015.  
Contact: Nicholas Falk.  
Urban regeneration consultants with experience of Action Planning events.

**Vista Consulting**

140 Ryde Park Road, Rednal, Birmingham B45 8RF.  
Tel/fax: 0121 457 8450.  
Contact: Ann Brooks.  
Information and consultancy on critical mass events such as Real Time Strategic Change.

# Events Listing

Main Action Planning events held in the UK, or held elsewhere but with strong UK involvement.

| Date  | Name/Place                      | Nature                                       |
|-------|---------------------------------|--|
| 5/85  | St Mary's Southampton           | Inner city regeneration                      |
| 3/88  | Highbury Initiative, Birmingham | New vision for entire city                   |
| 3/88  | Mon Valley, Pittsburgh, USA     | Redundant steel industry valley regeneration |
| 10/88 | Theatre Village, Newcastle      | Central city regeneration                    |
| 11/88 | Maiden Lane, London             | Modern housing estate improvements           |
| 1/89  | Bishopsgate, London             | Redundant railway land redevelopment         |
| 6/89  | Poundbury, Dorchester           | New settlement proposal                      |
| 10/89 | Wornington Green, London        | Housing estate improvements                  |
| 11/89 | Old Town, Hastings              | Traffic improvements in historic town        |
| 4/90  | Wood Green, London              | New vision for metropolitan district         |
| 7/90  | Cape Hill, Sandwell             | 'Radburn' housing estate redesign            |
| 9/90  | Kings Cross, London             | Alternative plan for key inner city site     |
| 11/90 | Smethwick, Sandwell             | Inner City Renewal Area                      |
| 7/91  | North Hull, Kingston-Upon-Hull  | Housing estates improvements                 |
| 4/91  | East Finchley, London           | Redundant factory site reuse                 |
| 5/91  | Pereslavl, Russia               | Provincial historic town planning proposals  |
| 5/91  | ECO 1, Moscow                   | Metropolitan district planning proposals     |
| 8/91  | Penwith Manor Estate, Lambeth   | Housing estates improvements                 |
| 5/92  | St Helier, Jersey               | Neighbourhood regeneration                   |
| 11/92 | Hulme, Manchester               | Inner city regeneration                      |
| 1/93  | Burgess Park, Southwark, London | District park regeneration                   |
| 2/93  | Castle Vale, Birmingham         | Vision for housing area on city outskirts    |
| 8/93  | Angell Town, Brixton, London    | Housing estate improvements                  |
| 12/93 | West Silvertown, London         | Urban village proposal for docklands         |
| 4/94  | Barcelona, Spain                | Principles of sustainable development        |
| 5/94  | Hammersmith Broadway, London    | Inner city neighbourhood regeneration        |
| 6/94  | Blairs College, Aberdeen        | New sustainable settlement proposal          |
| 6/94  | Muirhouse, Edinburgh            | Housing estate regeneration                  |
| 9/94  | Rocester, Staffordshire         | Housing site in village centre proposals     |
| 12/94 | Turin, Italy                    | Ecological inner city regeneration           |
| 1/95  | Miles Platting, Manchester      | Inner city industrial area regeneration      |
| 2/95  | Shankill Road, Belfast          | Inner city regeneration                      |
| 9/95  | Blairs College, Aberdeen        | Vision for university village proposal       |
| 10/95 | Hellersdorf, East Berlin        | Vision for system-built mass housing estate  |
| 11/95 | Rochdale, Yorkshire             | Mixed use canalside regeneration scheme      |

**Eligibility.** Events listed have followed fairly closely the process outlined in this book, or have been described as Action Planning events, planning weekends or urban design assistance teams. Many excellent but more general community planning exercises, including 'planning for real' events have not been included.

\* Events held over more than one weekend.

| <b>Length</b> | <b>Host/Organiser/Chairperson or Coordinator</b>                     |
|---------------|--|
| 3 days        | St Mary Street Group & City of Southampton/RIBA/Richard Burton       |
| 3 days*       | Birmingham City & DoE's City Action Team/URBED & DEGW/Nicholas Falk  |
| 5 days        | American Institute of Architects/John P Clarke                       |
| 5 days        | RIBA (Northern)/Newcastle Initiative/Neil Barker, Alan Simpson & JT  |
| 5 days        | London Borough of Camden/HTA/JT                                      |
| 5 days        | London & Edinburgh Trust/ Environment Trust & HTA /JT & Jon Aldenton |
| 5 days        | Duchy of Cornwall/HTA/JT   |
| 5 days        | Kensington Housing Trust/HTA/JT                                      |
| 1 day         | Hastings Old Town Forum/Urban Conservation Project/Nick Wates        |
| 2 days        | Haringey Council/Urban Design Group/John Worthington                 |
| 5 days        | Sandwell Metropolitan Borough Council/HTA/JT                         |
| 5 days        | Kings Cross Team/HTA/JT  |
| 5 days        | Sandwell Metropolitan Borough Council/HTA/JT                         |
| 2 days*       | North Hull Housing Action Trust                                      |
| 5 days        | local Labour Party & youth group/Will Hudson                         |
| 5 days        | Cultural Institute for Independent Analysis/UDG/Arnold Linden        |
| 11 days       | European Academy of the Urban Environment/Slava Glazychev/AvZ/JT     |
| 5 days        | London Borough of Lambeth/HTA/JT                                     |
| 5 days        | States of Jersey/Mason Design Partnership and HTA/Derek Mason & JT   |
| 5 days        | Hulme Regeneration Ltd/HTA/JT  |
| 2 days        | Business in the Community/DEGW/John Worthington                      |
| 4 days*       | Castle Vale Housing Action Trust/HTA/JT                              |
| 5 days        | London Borough of Lambeth/HTA/JT                                     |
| 5 days        | London Docklands Development Corporation/Urban Villages Forum/JT     |
| 7 days        | City of Barcelona/EAUE/Andreas von Zadow/JT                          |
| 2 days        | Hammersmith Community Trust/Vision for London/David Lewis            |
| 5 days        | John Muir Group/HTA/JT   |
| 5 days        | The Northwest Edinburgh Area Renewal/Vance Allen Associates          |
| 2 days        | The Planning Cooperative/Ian Davison                                 |
| 7 days        | City of Turin/Softech/EAUE/Antonella Marruco/AvZ/JT                  |
| 3 days        | Miles Platting Development Trust/Business in the Community/JW        |
| 5 days        | Greater Shankill Partnership/John Thompson & Partners/JT             |
| 4 days        | John Muir Group/JT&P/JT  |
| 5 days        | Wohnungsbaugesellschaft (WoGeHe) Hellersdorf/JT&P/JT                 |
| 5 days        | Rochdale Partnership/JT&P/JT   |

**Abbreviations**

|      |   |      |                          |
|------|---|------|--------------------------|
| AvZ  | Andreas von Zadow                         | JT   | John Thompson            |
| EAUE | European Academy of the Urban Environment | JT&P | John Thompson & Partners |
| HTA  | Hunt Thompson Associates                  | JW   | John Worthington         |
|      |   | UDG  | Urban Design Group       |

# Case studies

Examples of Action Planning events indicating the impact of several different approaches.

## Title, location, date and nature of event

### **North Downtown area, Portland, Oregon, USA, 1983.**

Standard 4-day R/UDAT organised by the American Institute of Architects to explore future possibilities for a neglected part of the central business district.

### **The Highbury Initiative, Birmingham, UK, 1988.**

3-day event to provide a new vision for the entire city. Hosted by the City Council and funded by the Department of the Environment's City Action Team.

## Outcome

A new local business association was formed immediately and a follow-up policy report, based on the event's proposals for land use and transport, was adopted by the City authorities two years later. A local property owners' association was formed in 1986 which produced an improvement programme for historic areas. In 1988, a Downtown development programme released by the City stated that the event had 'stimulated considerable interest in the North Downtown Area which led to the establishment of several area organisations, and inspired further in-depth studies by the Planning Bureau.'

An evaluation in 1992 – nine years after the R/UDAT event - states that the event's report is 'still being used by city hall'. 'Individual developers now use the UDAT study regularly to interest investors in the area's potential...whilst the recommendations on transportation and infrastructure improvements are being actively pursued through collaborations between the city authority and community and business interests.'<sup>1</sup>

The proposals produced by the event were adopted by the City Council as a provisional strategy for the city centre. The event also led to the City Engineer downgrading the inner city ring road and giving pedestrians priority.

A subsequent event one year later led to the formation of a special council committee to deal with the city centre, the setting up of associations for different neighbourhoods and the appointment of consultants to prepare urban design guidelines for them.

An evaluation in 1995 concludes: 'The event succeeded in generating a new vision, shifting the agenda and priorities and enlisting new energy. The work of the City Council in transforming the centre, with for example extensive public art, has helped to stem decline and boost investment prospects, and has been widely acclaimed by those who have seen the results.'<sup>2</sup>

1. *R/UDAT Handbook*, and Alan Simpson and Charles Zucker in *Urban Design Quarterly* No 49, January 1994.
2. Nicholas Falk, URBED, letter to the editor, 24 January 1995.

**Castle Vale Community Planning Weekend, Birmingham, 1993.**

5-day event as part of an 8-week consultation exercise on the future of a 1960s estate of 5,000 homes on the city outskirts. Commissioned by the Department of the Environment prior to tenants voting whether to form a Housing Action Trust.

The event helped residents establish a strategic vision for improvements to the estate and was followed by the highest ever recorded vote in favour of forming a housing action trust to take over management from the local authority.

A second, 2-day, community planning weekend was held to develop a physical masterplan; testing out proposals from the first event and those developed by the architects to ensure that the masterplan was fully in tune with what both local residents and local officials wanted. The masterplan has since been adopted in its entirety by the Housing Action Trust.

**Traffic Management Study Day, Hastings Old Town, 1989.**

1-day event to resolve traffic problems. Organised for a partnership of local groups by a local urban regeneration project.

The event resulted in proposals for a range of traffic calming measures which had not previously been thought of and which were unanimously agreed by all parties. Shortly afterwards the Borough's traffic officer was sent on a traffic calming training course. Local residents established a special working party and campaigned successfully for, and helped design, traffic calming measures in one street. Another strategic traffic calming measure was undertaken by the Borough and the County Council.

**West Silvertown Community Planning Weekend, London Docklands, 1993.**

5-day event organised by the Urban Villages Forum to test the idea of establishing an urban village on redundant dock land.

The event Team supported the proposal and the event helped to galvanise interest. Specific design ideas were generated, some of which later found their way into the developers brief for the site. Funds were raised to help establish a local development trust. The event was also a useful action learning process for the Urban Villages Forum which has used the experience in projects elsewhere.

**Greater Shankill Planning Weekend, Belfast, 1995.**

5-day event to plan a vision for the future of an inner city area particularly affected by the conflict in Northern Ireland.

The event attracted 600 people including representatives from 62 community groups, 45 public, statutory and private agencies and 5 political parties. It galvanised the Greater Shankill Partnership, representing a wide range of local interests, to prepare a funding bid for a £27 million regeneration project which, at the time of going to press, has been shortlisted by the Millennium Commission.

# Glossary

An explanation of the sometimes confusing terminology used in the field of Action Planning.

## Action Planning

An approach to planning and urban design involving the organisation of carefully structured collaborative events at which all sections of the local community work closely with independent specialists from all relevant disciplines.

## Capacity Building Workshop

Term used by the Prince of Wales's Business Leaders Forum to describe events organised primarily to establish partnerships between the public, private and voluntary sectors on development issues. Evolved from planning weekend experience. First event 1992.

## Charrette

See **Design Charrette**.

## Community Architecture

Architecture carried out with the active participation of the end users. Similarly Community Design, Community Planning etc.

## Community Planning Weekend

See **Planning Weekend**.

## Community Visioning

Term used to describe methods for getting communities to think and plan ahead.

## Critical Mass Event

Umbrella term for relatively new organisation development technique involving large-scale events often lasting several days and often involving hundreds of people. Mostly used for organisational change but may also be appropriate for community planning. Labels given to specific types of event – structured in different ways and promoted by different people – include **Future Search Conference, Large-Scale Interactive Process, Conference Model, Real-Time Strategic Change, Participative Work Redesign** and **Open-Space Meetings**.

## Design Assistance Team (DAT)

Term now used by the American Institute of Architects to describe state level Action Planning events. These evolved from the Institute's 20-year national level **Regional/Urban Design Assistance Team (R/UDAT)** programme (see below). Similar terms in use include **Urban Design Assistance Team (UDAT)** and **Housing Assistance Team (HAT)** (where only housing involved). Local **DAT** programmes have a wide variety of names; for example Ontario's **Community Assist/Urban Study Effort (CAUSE)** and Mississippi's **Small Town Action Team (STAT)**. First UK event was called a **Community/Urban Design Assistance Team (CUDAT)**.

## Design Charrette

Intensive design session, often including 'all-nighter', originally just for architecture students but more recently including the public and professionals. Term originated at the Paris Ecole des Beaux-Arts at the turn of the century and is widely used in the USA. **Charrette** now often used without the 'Design' in front.

## Design Day

Term used by the Royal Institute of British Architects to describe day when teams comprising architects and local people brainstorm for design solutions to particular building problems.

## Focus Group

Small group of people who work through an issue in workshop session.

## Future Workshop

Method for finding creative solutions for pressing problems using topic-based workshop. Not restricted to planning issues. Devised by Robert Jungk.

**Participatory Rapid Appraisal (PRA)**

Method for gaining a rapid in-depth understanding of a community, or certain aspects of a community, based on the participation of that community. Not restricted to planning issues.

**Planning for Real**

Technique for community involvement in planning and development focussing on the construction and use of flexible cardboard models and priority cards. Devised by Dr Tony Gibson and now promoted by the Neighbourhood Initiatives Foundation (see pages 84, 87).

**Planning Assistance Team (PAT)**

Event programme started by US Air Force using R/UDAT process during weekdays to examine planning issues relating to its bases.

**Planning Weekend**

Term most commonly used in the UK for an Action Planning event spanning a weekend. First used in 1989 at Bishopsgate. The term

**Community Planning Weekend** is also used (often with the word 'community' being added during the process). Terms **Planning Week** and **Community Planning Week** have also been used for slightly longer events. Also **Community Planning Day**.

**Regional/Urban Design Assistance Team (R/UDAT)**

The first urban design orientated Action Planning event programme started by the American Institute of Architects in 1967 and still running. A **Generic R/UDAT** uses same process to look at problems common to many communities. A **Mini R/UDAT** uses similar process with a student Team. See also **Design Assistance Team**.

**Stakeholder**

Person or organisation with an interest because they will be affected or may have some influence.

**Study Day**

Day spent examining a particular issue. Often the programme is based on a similar structure to a planning weekend. Useful for simple issues.

**Task Force**

Term used to describe The Prince of Wales's annual European Summer School in Civil Architecture. An Action Planning process over a 6-week period with emphasis on education.

**Think Tank**

Increasingly used by governments and city authorities, often for 'experts' only. More conventional approach but may use an Action Planning format. Sometimes called **Expert Panel** or **Symposium**.

**Urban Design**

Emerging discipline concerned with the built form and ecology of streets, neighbourhoods and cities.

**Urban Design Action Team**

Term adopted by the Urban Design Group for its first UK Action Planning event in 1990 and used again since. (Note the American Assistance has changed to Action – see **Design Assistance Team**.)

**Workshop**

Meeting at which a small group, perhaps aided by a facilitator, explores issues, develops ideas and makes decisions. A less formal and more creative counterpart to public meetings and committees. A **Topic Workshop** focusses on specific issues. A **Design Workshop** includes the use of participatory design techniques.

# Action Planning Planner

An aid to designing your own event.

|                                   |   |
|-----------------------------------|---|
|                                   | <b>Sample</b> (based on example page 27)  |
| <b>Location</b>                   | Anytown.  |
| <b>Reason for Action Planning</b> | Decline of traditional industry. Lack of investment in housing. Unemployment. Derelict sites. Uncertainty. Despondency. |
| <b>Aims of initiative</b>         | New sense of vision. Programmes of action, long and short term. Agenda 21 response.                                     |
| <b>Type of event</b>              | Planning weekend.   |
| <b>Length of event</b>            | 4 days.   |
| <b>Lead time</b>                  | 5 months.   |
| <b>Timing of event</b>            | Weekend before Easter next year.  |
| <b>Related initiatives</b>        | Agenda 21 conference. Developers' deadline for town centre.   |
| <b>Organiser</b>                  | Anytown Environment Network.  |
| <b>Associate organisers</b>       | National Urban Trust.   |
| <b>Supporters</b>                 | Anytown Council & Chamber of Commerce.  |
| <b>Approximate cost</b>           | £20,000.  |
| <b>Funding sources</b>            | Shell, Greenpeace, local firms.   |
| <b>Administration</b>             | Architects Company.   |
| <b>Support bodies</b>             | National Urban Trust.   |
| <b>Technical support team</b>     | Anytown College Urban Design Department.  |
| <b>Team Chairperson</b>           | Sally Facilitator.  |
| <b>Team members</b>               | John Engineer, Jane Ecologist, Simon Urbanist, Jenny Economist, Mark Editor.  |
| <b>Follow-up responsibility</b>   | Anytown Environment Network.  |
| <b>Other</b>                      | Possibility of link-up with the government's urban design campaign.   |

|                                   | <b>Your event</b>       |
|-----------------------------------|-------------------------|
| <b>Location</b>                   | .....                   |
| <b>Reason for Action Planning</b> | .....<br>.....<br>..... |
| <b>Aims of initiative</b>         | .....<br>.....          |
| <b>Type of event</b>              | .....                   |
| <b>Length of event</b>            | .....                   |
| <b>Lead time</b>                  | .....                   |
| <b>Timing of event</b>            | .....                   |
| <b>Related initiatives</b>        | .....<br>.....          |
| <b>Organiser</b>                  | .....                   |
| <b>Associate organisers</b>       | .....                   |
| <b>Supporters</b>                 | .....                   |
| <b>Approximate cost</b>           | .....                   |
| <b>Funding sources</b>            | .....                   |
| <b>Administration</b>             | .....                   |
| <b>Support bodies</b>             | .....                   |
| <b>Technical support team</b>     | .....                   |
| <b>Team Chairperson</b>           | .....                   |
| <b>Team members</b>               | .....<br>.....          |
| <b>Follow-up responsibility</b>   | .....                   |
| <b>Other</b>                      | .....<br>.....          |



**Nick Wates** is a writer, researcher and publisher specialising in community-based planning and architecture.

Previous books include *The Battle for Tolmers Square*, Routledge, 1976 and *Community Architecture; how people are creating their own environment* (with Charles Knevitt), Penguin, 1987 (also in Japanese, 1992, and Chinese, 1993).

Since his first involvement with Action Planning in 1985, he has participated in eight events in the roles of journalist, coordinator, Team member, support staff and observer.

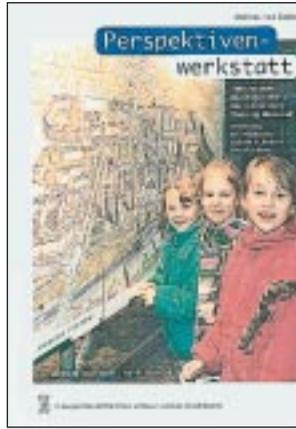
He is a Senior Research Associate at The Prince of Wales's Institute of Architecture in London and lives on the south coast of England between Hastings and Rye.

# Foreign translations



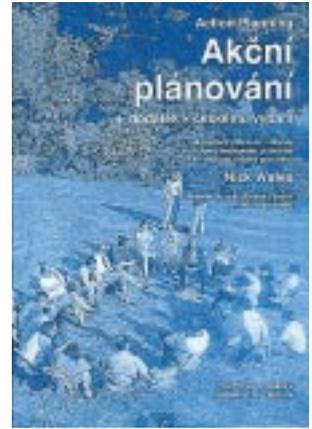
**Chinese, 1996**

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**Ching-Dar Hsieh,**  
**Chuan Hsing Publishing**  
**Company,** 1996  
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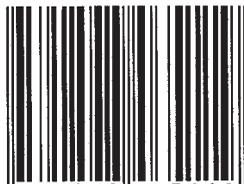
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