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Date:	Thursday, 07 September 2023	Torquay
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Dear Member

OVERVIEW AND SCRUTINY BOARD - WEDNESDAY, 6 SEPTEMBER 2023

I am now able to enclose, for consideration at the Wednesday, 6 September 2023 meeting of the Overview and Scrutiny Board, the following reports that were unavailable when the agenda was printed.

Agenda No	Item	Page
6.	**Review of Planning Services Fit for the Future** Background Documents	(Pages 2 - 75)
	Note: this pack has been updated with the Project Initiation Document being made public.	

Yours sincerely

Governance Support
Clerk

TORBAY COUNCIL

Planning, Housing and Climate Emergency - Service of the Future
Project Initiation Document (PID)

Current Version:	1.05
Status	Updated
Document Name:	Planning, Housing and Climate Emergency - Service of the Future
Author(s):	- Anne-Marie Bond, Chief Executive - Kevin Mowat, Director of Place - David Edmondson, Divisional Director of Planning, Housing and Climate Emergency Service - Matthew Fairclough-Kay, Divisional Director of Corporate Services - Stuart Loly, Project Manager, Business Improvement & Change
Senior Responsible Owner:	Anne-Marie Bond, Chief Executive
Last Review:	09 August 2022

Version Control

Version	Date	Brief description of amendments / changes	Officer
1.01	01/03/22	Approved	Anne-Marie Bond
1.02	02/03/22	Updated with workstream details	Stuart Loly
1.03	24/03/22	Section 5. Project Performance & Deliverables/Products updated KPIs	Eve Bates, Stuart Loly
1.04	04/04/22	Section 5, Project Performance & Deliverables/Products updated with KPIs linked to staff retention and staff morale	Stuart Loly
1.05	09/08/22	Section 5, Project Performance & Deliverables/Products updated with KPIs.	Stuart Loly

1. Purpose

The purpose of the Project Initiation Document (PID) is to define the project, to form the basis for its management and to help with the assessment of the project's overall success.

The two primary uses of the PID are:
*   To ensure the project has a sound basis before asking the Project Board to make any major commitment to the project;
*   To provide a baseline document against which the Project Authority (Project Board) and Project Manager can assess progress, change management (Project Issues) and on-going viability.

This document has been produced to capture and record the basic information needed to correctly direct and manage the project. The PID addresses the following fundamental aspects of the project:

*   What is the project aiming to achieve;
*   Why it is important to achieve the stated aims;
*   Who will be involved in managing the project and what are their roles and responsibilities.

When approved by the Project Board, this PID will provide the 'Baseline' for the project and will become 'frozen'. It will be used at the conclusion of the project to measure whether the project was managed successfully and delivered an acceptable outcome for the sponsor / user / customer.

2. Background

Over a relatively short period the Council has had a number of leaders of the Planning, Housing and Climate Emergency Services, each of whom have worked hard to support the development of the service. Concerns however remain, with challenging performance statistics and high numbers of complaints in respect of development management.

Against this background the Chief Executive requested the Planning Advisory Service (PAS), part of the Local Government Association (LGA), to undertake a review looking at three distinct aspects of the Development Management Service (DMS), namely:

*   Registration and validation;
*   Staff structures;
*   Customer Service training.

As well as delivering against the PAS recommendations, it is recognised that there is a need to look at the entire service and how the different elements of the service interlink.

As a consequence, the Chief Executive has requested the creation of a formal project in order to implement the PAS recommendations whilst also ensuring that a review of the whole service is undertaken, including how the different elements interlink.

As such this PID has been created to define the scope of the 'Planning, Housing and Climate Emergency - Service of the Future' project for sign off by the Chief Executive and Director of Place.

3. Objectives

The main objective of the Project will be to strengthen and build the effectiveness of the service, ensuring that each element of the service can unite behind a common purpose of becoming fit for the future, through the delivery of efficient and effective services.

Other key objectives of the Project are as follows:
a) Continue to implement the Planning Service Action Plan, which are not business as usual activities (see Appendix A);
b) Implementation, where appropriate, of the PAS recommendations;
c) Consider structure/resources within the Spatial Planning Team;
d) To improve business resilience and productivity;
e) To have efficient and effective management structures;
f) To support, develop and retain staff;
g) Create a positive and inclusive working environment;
h) Good delivery of key performance indicators (KPIs) across all elements of the Service.

The critical success factors (CSFs) of the Project can be categorised into the following areas, and include re-design of the services to achieve a fundamental change of the future:

- Registration and validation – written guidance/instructions manuals produced,

- Team Structures and Responsibilities – review of all posts to ensure officers have the right skill set and to reduce single points of failure.

- Team Succession Planning – creation of a training programme to raise skills of officers (e.g. Heritage, Urban Design, Ecology, Landscape and Trees) and improve career progression.

- Website – additional self–help information, updated Local Validation List and improved invalid letter.
- Systems and technology:
    i. Implementation of Enterprise module in Uniform Idox or a similar project management tool;
    ii. Implementation of Idox Total Land Charges System;
    iii. Implementation of Exacom System for CiL/Section106 (already purchased);
    iv. Purchase and implementation of the Exacom public facing module.

4. Project Scope & Exclusions

The initial scope of the Project includes:

a) How we deliver services, which may include reconfiguration and changes in some cases (including how we use people, processes and technology);
b) How we provide training and development opportunities across all of the Service;
c) How we communicate as a Service.

The scope includes considering the PAS recommendations, as detailed below:

Registration and validation

R1   Supplement the current practice of one-to-one instruction of registration procedures with simple guidance notes using annotated screen shorts from the relevant sections of the IDOX system. Use best practice from other LPAs to reduce the burden of work.

R2   Review the allocation of responsibilities for validation so that either more responsibility is given to the Planning Support Team to carry out the more procedural aspects of validation or validation is clearly identified as a responsibility for specific officers as part of their work programme. There should be a clear allocation of responsibility to avoid uncertainty and duplication. These responsibilities should be appropriate for the grade and clearly and consistently implemented.

R3   Implement the Enterprise module in Uniform IDOX or a similar project management tool to reduce double handling, excessive use of emails and increase the speed of the decision making process throughout the lifetime of a planning application.

R4   Review the current Local Validation List in line with NPPF (para.44) requirements and to improve its access for non Planning specialists. Review the Council website to ensure that older versions of the Local Validation List are removed from view.

R5   Review the content of the invalid letter to enable it to be more informative and customer friendly for the applicant and enable greater flexibility for self help through website links.

Team structures and responsibilities

R6   Review the existing team structure so that the existing Principal Planners have formal line management responsibilities for the Planning Officers, emerging Planning Enforcement Officer post and Assistant Planning Officer posts. To compensate for this additional responsibility it will be important that the Planning Officers have the necessary skills and career progression to manage a more complex caseload.

R7   Review the Assistant Planning Officer role so that it can be used more effectively as a career platform for entry level Planners and can make best use of the RTPI apprentice route to professional Planning qualifications.

R8   Review the role of Principal Planner (Delivery) to better align the post to the strategic priorities in the Local Plan and to support the promotion of PPAs to fund proactive partnerships with key developers in Torbay.

R9   Review all the role profiles in the Customer Service and Planning Support Team to better reflect the actual work that the team undertakes and also resolve the current confused roles and responsibilities.

R10   Complete the creation of a new Planning Enforcement Officer using one of the existing Planning Officer posts to fund the post. In addition add Planning

Enforcement work either as a second Planning Enforcement Officer post or as part of the Planning Officer job description to create a more flexible workforce.

R11   Increase the existing heritage expertise within Development Management by either increasing the skills of existing Planning Officers or employing a separate heritage specialist who can advise on more complex matters and act as the case officer for such applications when appropriate.

R12   Consider the direct employment of specialist officers such as Heritage, Urban Design, Ecology, Landscape or Trees based on the basis of a value for money exercise using the current costs of procuring these skills as a reference point. As an alternative give consideration to shared arrangements with neighbouring authorities.

R13   If as a consequence of recommendation R12 specialist officers are employed directly either create a line management structure through an existing Principal Planner post or create a separate team within the Planning service.

Customer service

R14   Undertake a follow up reflective session following the customer services training held on 8th December 2021 and agree a plan of action that will follow the learning points from the training. Communicate the learning points and actions to key consultative forums such as the Neighbourhood Plans forum and Local Agents' Forum.

Exclusions

The exclusions for the project include:

- The implementation of the Carbon Neutral Torbay Initial Action Plan for tackling climate change. This is excluded as it is already covered by existing activities. However, the resource requirements within the Climate Emergency Service is in scope as part of 'How we deliver services (4a).'
- Business as usual (BAU) activity identified in the current Action Plan for the Planning Service (see appendix A).

5. Project Performance & Deliverables/Products

The overall successful delivery of the project, and performance, will be measured by the service producing evidence to show:

a) National and locally agreed performance indicators in Corporate Plan Performance Report:
    1. % of Major planning applications determined: (statutory timeframe 13 weeks) – including within extension of time
    2. % of Major planning applications determined: (statutory timeframe 13 weeks) – ignoring extension of time
    3. % of Minor planning applications determined: (statutory timeframe 8 weeks) – including within extension of time
    4. % of Minor planning applications determined: (statutory timeframe 8 weeks) – ignoring extension of time
    5. % of Other planning applications determined: (statutory timeframe: 8 weeks) – including within extension of time

6. % of Other planning applications determined: (statutory timeframe: 8 weeks) −
   ignoring extension of time
7. Number of planning decisions for major (for context only)
8. Number of planning decisions for minor (for context only)
9. Number of planning decisions for other applications (for context only)
10. Number of planning appeals for major applications
11. Number of planning appeals for minor applications
12. Number of planning appeals for other applications
13. % of decisions overturned at appeal for major applications (for context only)
14. % of decisions overturned at appeal for minor applications (for context only)
15. % of decisions overturned at appeal for other applications (for context only)
16. % of appeals upheld in the applicants favour - major applications (for context
    only)
17. % of appeals upheld in the applicants favour - minor applications (for context
    only)
18. % of appeals upheld in the applicants favour - other applications (for context
    only)
19. % of appeals with split decisions - major (part upheld) (for context only)
20. % of appeals with split decisions - minor (part upheld) (for context only)
21. % of appeals with split decisions - other (part upheld) (for context only)

b) Local performance indicators:
   1. % of total applications validated within 5 working days, from when required
      information is received.
   2. Average number of days taken to validate all applications, from when required
      information is received.
   3. Average number of days taken to validate: major, minor and other
      (separately), from when required information is received.
   4. Number of enforcement cases received (for context only)
   5. Number of enforcement notices issued
   6. % of enforcement contacts that resulted in successful prosecution
   7. % of staff turnover (posts left and recruited to in a given period: either month
      or year)
   8. % of applications dealt with within the agreed target time (by each planning
      officer)
   9. Cost per population of the planning services (to include the benchmarking
      groups that will be used throughout the whole organisation: Chartered
      Institute of Public Finance and Accountancy [CIPFA] neighbours; statistical
      comparator neighbours; and Devon authorities by Revenue Outturn [RO] line)
   10. Total £s of income received for planning applications
   11. Total £s paid back to the customer for returned planning fees
   12. Total amount of £s spent on planning appeals
   13. Total amount of £s recuperated from overturned planning appeals
   14. Customer satisfaction on the received planning service (post decision notice
       customer satisfaction survey sent to each customer)
   15. % of undetermined applications outside extension of time (in excess of 20
       weeks)
   16. Total spend (£) of refunded application fees where applications were not
       determined within the statutory time period/or with extension of time and have
       requested the fee back under the Planning Guarantee, by quarter
       (accumulative quarter total)

c) Service performance indicators:
1. Number of applications determined (by month)
2. Number of applications valid (by month)
3. Average number of days taken to inform a customer application is invalid. (by month)
4. Number of applications received (by month)
5. Planning approvals (by month)
6. Planning refusals (by month)
7. Planning split decisions (by month)
8. Planning other decisions (by month)
9. Planning officer workload total (identifying the numbers within and over determination due date)
10. Planning officer workload – number of outstanding applications past the target date (identifying what type of application they are)
11. Number of preliminary enquiries received (by month)
12. Number of enforcement cases open (by month)
13. Number of enforcement cases closed (by month) does not include notice issued
14. Total complaints received by month
15. Total complaints responded to within 20 working days or 30 working days with extension, by month (where a response was due in the month)
16. Total number of overdue complaints by month

d) HR performance indicators:
1. Staff turnover in the 12 months leading up to the project beginning %
2. Staff turnover in the 12 months following project completion %
3. Absence monitoring e.g. staff days lost to sickness absence
4. Number of grievances/disciplinaries/investigations/capability procedures across the teams during a prescribed timescale for comparison.

e) Staff satisfaction performance indicators:
1. How staff are coping emotionally
2. Perceptions of managerial support, how they are supported and any suggested improvements
3. 1 to 1s with manager
4. Frequency of 1 to 1 meetings
5. Knowledge of the organisational support available
6. Work related physical health
7. Work related mental health
8. Perceptions of connectivity with their teams

We would expect data for performance indicators to be shared at project meetings, to review and monitor the performance progress.

The following products will be delivered from the Project, for sign off by the Senior Responsible Owner:

f) Re-design and implementation of existing team structure roles, including a training review and training plan as well as a recruitment and retention strategy for staff (R2, R6-R11, R13).

g) Written guidance/instruction manuals for registration and validation (R1).
h) Implementation of systems:
   i. the Enterprise module in Uniform Idox or a similar project management tool (R3);
   ii. Implementation of Idox Total Land Charges System;
   iii. Implementation of Exacom System for CiL/Section106 (already purchased);
   iv. Purchase and implementation of the Exacom public facing module.
i) Additional self-help information on the website and updated Local Validation List (R4).
j) Production of a more informative and customer friendly invalid letter (R5).
k) A value for money report on the direct employment of specialist officers (e.g. Heritage, Urban Design, Ecology, Landscape and Trees) or shared arrangements with neighbouring authorities (R12).
l) A lessons learnt report, from customer services training, including actions for circulation to consultative forums (R14).
m) A set of defined service deliverables/ key performance indicators, and improving performance against the same.

6. RACI Matrix

RACI (pronounced as "ray see") is an acronym for Responsible (R), Accountable (A), Consulted (C), Informed (I). A RACI matrix is a common project management tool for clarifying and communicating roles and responsibilities for project tasks and deliverables. It is used for projects where people may have specific roles and responsibilities, there may be many different stakeholders, and the project may cross multiple teams.

Deliverables	Senior Responsible Owner	Project Manager	Support	Senior User	Senior Supplier	Workstream Lead	Subject Matter Expert
	Anne-Marie Bond	Stuart Loly	Emma Sandford / Lorraine Stewart	Kevin Mowat / David Edmondson	Various	Various	Various
Project Deliverables							
Re-design of team	A	I	I	R	C	I	I
Written guidance/ instruction manuals	I	I	I	A	C	C	R
Systems and technology	I	I	I	A	R	R	C
Website and updated Local Validation List	I	I	I	A	C	C	R
Improved invalid letter	I	I	I	A	C	C	R
Specialist officers or shared arrangements	A	I	I	R	C	C	C
Lessons learnt from customer services training	I	I	I	A	I	C	R
KPIs	C	I	I	A	I	C	R
Project Management Deliverables							
Project RACI	A	R	I	A	I	I	I
Risk Log	A	R	I	A	C	C	C
Project Plan	A	R	I	A	C	C	C
Progress Report	I	I	I	I	C	R	I
Lesson Log	A	R	C	C	C	C	C

7. Interfaces and Dependencies

The Project will maintain an interface with the Council Redesign Programme and will report by exception to Directors Overview Meeting (DOM).

8. Constraints

The main constraints to the Project are as follows:
- Staff availability to contribute to the project, on top of existing business as usual commitments and activities;
- Any funding requirements outside of existing budgets;
- Project "buy in" from existing team due to number of previous reviews with staff and stakeholders that have not translated into significant change;
- Other Support Services priorities;
- Divisional Director of Planning, Housing and Climate Emergency (Senior User) not available at initiation of the project.

The project has been allocated a budget of £200k (revenue). The intention is to use £100k for the 'people' aspects of the project and £100k for the 'systems/technology' aspects.

9. Initial Project Plan

Deliverable	Further information	Date
Acceptance of the PID	To be approved by the Chief Executive and Director of Place	Early February 2022
Appointment of project team	This will include Senior Suppliers and Subject Matter Experts.	End February 2022
Review current action plan and recommendations	Review of the current Planning Service Action Plan and PAS recommendations	March 2022
Workstreams to be confirmed	Development of detailed workstreams	March 2022
Draft and approve project plan	Input gained from workstreams	End March 2022
Delivery of workstream products	Overseen by regular Project Board meetings	March to September (estimated at this stage)

10. Initial Business Case / Business Benefits

Benefits of the project will include:
a) improved delivery of services;
b) improved Key Performance Indicators;
c) improved clarity of roles and responsibilities;
d) improved support for staff and customers;

e) improved development and retention of staff;
f) improved delivery of other projects;
g) improved resilience of services.

The project will consider the structural and cultural changes that need to ensure that this is delivered.

As a consequence of the changes, it is anticipated that there will be improvements in the resilience of services.

11. Initial Risk Log

The Project Board will hold and manage its own Risk and Issue Log, and will report by exception to the DOM.

Initial risks have been identified as:

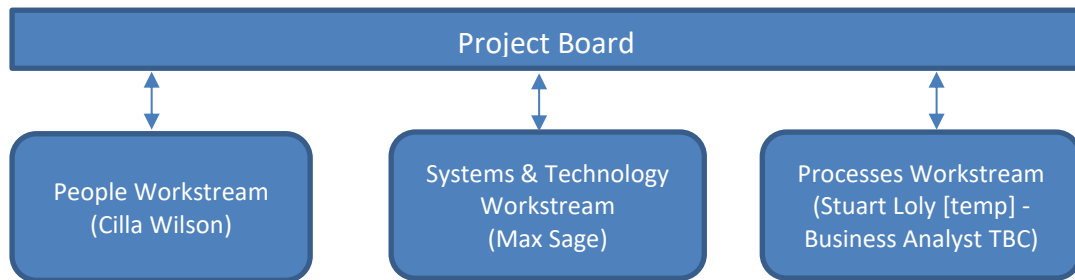|	Risk Description	Mitigation
1	Successful engagement of all sections within the Service to contribute to the project	• Identify Directorate representative to actively participate with activities, communication and engagement. • Clear communication and engagement plan.
2	Insufficient resources – i.e. staff and budget	• Review workloads to allow a focus on the project. • Accept and communicate that short term detriment is necessary for the long term benefit.
3	Benefits not being clearly defined, delivered or communicated.	• Comms plan to be updated monthly and fed back to managers to cascade to their team and put on intranet.
4	Reduction in staff morale	• Clear communication strategy to explain rational for project group and regular engagement and communications with service.
5	There is not significant change, to embed the objectives of the project, and achieve long term and sustainable change.	• Chief Executive (SRO) will provide ultimate authority and control for ensuring the project meets objectives and delivers the projected benefits.
6	Divisional Director of Planning, Housing and Climate Emergency (Senior User) may not be available at start of project.	• Liaison with SRO for mitigation to reduce risk.

12. Project Governance

A 'Planning, Housing and Climate Emergency - Service of the Future' Project Board will be created and will track and monitor progress, managing relevant resources and monitor any delivery risks and issues. This will include tracking of progress against key milestones and monitoring the delivery of benefits.

The project board will report directly to DOM. DOM will provide assurance of quality and objectives, track overall delivery and make strategic decisions in relation to scope, investment and risk management.

Role	Name	Responsibilities
Senior Responsible Owner	- Anne-Marie Bond, Chief Executive	Ultimate authority and control for ensuring the project meets objectives and delivers the projected benefits.
Senior User	- Kevin Mowat, Director of Place - David Edmondson, Divisional Director of Planning, Housing and Climate Emergency	Represents all areas within Planning, Housing and Climate Emergency.
Senior Suppliers	- Cilla Wilson, HR Manager - Gavin Dunphy, Head of IT - Tieneka Akers, Internal Engagement Officer - Max Sage, Project Leader, IT Services	Represents the supplier interests
Workstream Leads	Senior Suppliers to act as workstream leads for: - People (Cilla Wilson) - Systems & Technology (Max Sage) - Processes (Stuart Loly – temporarily - until Business Analyst is available from the Business Improvement & Change Team)	Delivers the project products
Subject Matter Experts	Directorate representatives - Wendy Ormsby, Development Management - Mark Irving, Planning Support - Adam Luscombe, Spatial Planning - Matt Hunt, Building Control - Justin Carpenter, Planning Support	Advises Workstream Leads

Role	Name	Responsibilities
Project Management / Support	- Stuart Loly, Project Manager, Business Improvement and Change - Emma Sandford, Chief Executive Personal Assistant - Lorraine Stewart, Personal Assistant to the Director of Place and Divisional Director of Corporate Services	Plans and delivers the project on a day to day basis.

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        │ People        │  │ Systems &        │  │ Processes Workstream │
        │ Workstream    │  │ Technology       │  │ (Stuart Loly [temp] -│
        │ (Cilla Wilson)│  │ Workstream       │  │ Business Analyst TBC)│
        │               │  │ (Max Sage)       │  │                      │
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13. Communication Plan

A communication plan will be prepared for consideration by the Board with the draft project plan.

Appendix A
Current Action Plan for the Planning Service recently updated through the Cabinet & Directors Sessions, 22 November 2021

Agreed vision for the Planning Service
The service will be efficient, engaging, proactive, and responsive. Officers will always be firm but fair and will take an appropriate interventionist approach for the benefit of the Bay.

Key:
Green   – completed and **excluded** from this project scope;
Blue   – business as usual activity, therefore **excluded** from project scope.
White   – **included** as part of project scope.

Original Actions, plus Next Steps and New Actions	By when	Update Nov 2021
1.0 Engagement		
1.1 Re-establish regular Agents Forums, customer feedback **Next steps/additional actions:** - Broaden attendance and hold additional combined Neighbourhood Forum and Agents Forums – David Edmondson; - Junior officers to attend to build relationships – Wendy Ormsby	April 2021 then ongoing By January 2022 then ongoing	2 Forums held, next is on January 26th .
1.2 Greater use of Planning Performance Agreements (PPA), including the payment for dedicated officers – see additional actions under Staff Matters. **Next steps/additional actions:** - Establish arrangement for TDA to fund PPA for TDA led projects – Kevin Mowat - Progress PPA for signing for HIP2 with ICO – Cllr Steve Darling/Anne-Marie Bond	Immediately on appropriate cases January 2022 January 2022	Achieved
1.3 Greater use of the Design Review Panel, to help improve the quality of larger schemes submitted to the Council **Next steps/additional actions:** Review existing Design Review Panel and develop/embed culture of stated approach – David Edmondson/Wendy Ormsby	Immediately on appropriate cases January 2022	Need to reemphasise to team, only been one recently
1.4 Engagement with Neighbourhood Forums in pre-application processes **Next steps/additional actions:** - Continue reinforce with officers and link to joint Agent and Neighbourhood Forum Sessions (see action above) – David Edmondson/Wendy Ormsby - Develop joint protocol for working approach with the Council, Neighbourhood Forums and Agents – David Edmondson/Wendy Ormsby	By June 2021 Ongoing January 2022	

Original Actions, plus Next Steps and New Actions	By when	Update Nov 2021
1.5 Continue close partnership working with Homes England, Historic England, registered providers, NHS Partnership Trust, South Devon College, etc.	Ongoing	Ongoing regular meetings. Interventions planned in several sites.
NEW: 1.6 Strengthen relationship with TDA and Planning for delivery and management of Council projects, including: - establish clear expectations required of project leads eg. PPA and how DRP will be conducted – Anne-Marie Bond/Kevin Mowat - hold monthly meetings with TDA – David Edmondson/Wendy Ormsby/Liam Montgomery	January 2022, then monthly meetings	
NEW: 1.7 Review Site Visits as opportunity for to develop member/officer relations: - Review ability for physical site visits for Planning Committee urgently with Public Health – June Gurry; - Officer sites visits required for applications unless very clear/straight forward application with no objections – Wendy Ormsby	Complete – Public Health advise against due to risk of Covid November 2021, ongoing	
NEW: 1.8 Review criteria and approach to Site Review Meetings to enable established criteria and trigger points for virtual meetings and where no resolution ability to escalate to physical visit or refer to Planning Committee. – David Edmondson/Wendy Ormsby for Cabinet members to consider	January 2022	
2.0 Members		
2.1 Member Training Programme - Including Chair's training programme **Next steps/additional actions:** - Evaluate Planning Committee training following receipt PAS feedback report; - Consider Planning Committee induction programme and ongoing annual training programme including specific training for Chairman of Planning Committee; - Revisit Member Job Descriptions in the Constitution to build in skills and expectations David Edmondson/Wendy Ormsby/Teresa Buckley	Beginning shortly Start January 2022	Started with Historic Environment (Sept) & Role of Councillors (Oct) Flooding & Drainage on 2nd December
3.0 Climate Change		
3.1 Sustainability Checklist for Validation purposes, enhancing the energy efficiency of proposed development.	By June 2021	Drafted by Jacqui Warren, Wendy

Original Actions, plus Next Steps and New Actions	By when	Update Nov 2021
		incorporating into revised Validation Checklist
NEW: 3.2 Prepare/combine Climate Change and Healthy Living in one Supplementary Planning Guidance document – David Edmondson/Adam Luscombe	By February 2022	
4.0 Staff Matters		
NEW: 4.1 To resource PPAs, identify HR Strategy for recruitment, backfill and ensuring sufficient resources to deliver PPAs quickly – David Edmondson/Wendy Ormsby/Sue Wiltshire	Dec 2021	
NEW: 4.2 Review strategy for specialist posts and purchase of services with sharing resources across neighbouring authorities to build resilience – David Edmondson/Wendy Ormsby	January 2022 and ongoing	
4.3 Establish new 'team within the team', dealing with design, public realm & historic environment issues	By June 2021	Successful
4.4 Improved Officer e-mail & telephone communication **Next steps/additional actions:** - PAS to deliver training on customer standards – all officers - Establish standards/criteria for response times and consider more use of phone calls/Teams meetings instead of emails – Wendy Ormsby - Introduce standard auto out of office response to manage expectations – Wendy Ormsby - Consider how to facilitate informal discussions between members and officers using Children's Practice Week or 'day in the life of' formats – David Edmondson/Wendy Ormsby/Teresa Buckley	By February 2022, ongoing	Ongoing, all officers on Customer Service training
4.5 Contact with Ward Councillors regarding local applications **Next steps/additional actions:** - As above	Immediately	Still needs re-emphasising
4.6 Staff development programme, avoid poaching from neighbouring authorities. **Next steps/additional actions:** - Introduce new training and development package for team to enable them to deliver an excellent service (meeting vision outlined above), including potential of setting up Planning Academy (similar to our Social Worker approach working with Plymouth	July 2021 Start January 2022, ongoing	Retained all staff to date. Opportunity being offered to one who nearly left

Original Actions, plus Next Steps and New Actions	By when	Update Nov 2021
University), to ensure staff feel valued – David Edmondson/Wendy Ormsby - Embed the new culture in the recently started new planning staff	Immediately	Achieve with June & Trenton, started with Carlo
NEW: 4.7 Undertake options appraisal for meeting conservation statutory functions, including training and development for wider team on conservation/heritage matters as well as dedicated officer – David Edmondson/Wendy Ormsby	By February 2022	
4.8 Embed the new culture in the recently started new planning staff. **Next steps/additional actions:** - Prepare specialist induction for new Planning Staff –links to training and development plan above.	Immediately	Achieved with June & Trenton, started with Carlo
5.0 Administrative support/ Validation/Digitalisation		
5.1 Filling Vacant Administrative post	April 2021	
5.2 Trial the outsourcing of the Validation process, following Business Process Mapping recommendations. **Next Steps/additional actions:** - Identify resource needs and solutions to resolve short term capacity issue, including looking at other councils' approach, to make changes within 6 months and to enable the service to progress – Martin Phillips/Kevin Mowat/David Edmondson/Wendy Ormsby - Review following PAS feedback report, to identify firm proposals for validation process, staff resource requirements and where this sits within the planning team's structure – David Edmondson/Wendy Ormsby	April 2021 December 2021 By February 2022	Pulled out of this, pending PAS work and changing Role Profiles building more flexibility
5.3 Temporary additional cover for Land Charges Team, to handle backlog and high demand due to Stamp Duty Holiday	Started	Cover worked incredibly well and supported the team
5.4 Installation of new Land Charges back office System	By June 2021	Govt finance coming our way which will help pay for it
5.5 Further digitalisation of information to allow for faster delivery of Land Charges Searches	Six months	Linked to the above
5.6 Establishment of the Exacom new back office Section 106/CiL system. **Next steps/additional actions:**	Started	Nearly in place

Original Actions, plus Next Steps and New Actions	By when	Update Nov 2021
- Set up project board (to include interface with wider Council teams) and prepare detailed project plan to ensure delivery. - Consider wider digitalisation across Planning service, prepare scope for project and link as sub-set of CRM Project Board. – David Edmondson/Wendy Ormsby	By February 2022	
6.0 Other		
NEW: 6.1 Prepare Section 215 action plan		

Key:

Green	– completed and **excluded** from this project scope;
Blue	– business as usual activity, therefore **excluded** from project scope.
White	– **included** as part of project scope.

TORBAY COUNCIL

Actions: Cabinet and Directors' Priority Sessions – Planning Service

22 November 2021

-: Present :-

Anne-Marie Bond, Councillor Christine Carter, Councillor Darren Cowell, Councillor Steve Darling, Councillor Cordelia Law, Councillor Swithin Long, Councillor Mike Morey, Martin Phillips and Councillor Jackie Stockman

(Also in attendance: June Gurry, David Edmondson and Wendy Ormsby)

1.   **Apologies**

Apology from Councillor Loxton.

2.   **Format and Scope of Session - Anne-Marie Bond to introduce and facilitate**

Resulting Action Plan and Way Forward as attached.

TORBAY COUNCIL

Cabinet and Directors' Priority Session – Planning Application Process Improvement: Action Plan

22 November 2021, 9.30 am to 1 pm, Torre Abbey

Scope

What outcomes are we are seeking to achieve

- Identify what we want our Planning Service to look like and confirm the tangible changes needed, including additional resources needed, Enforcement and S215 Torbay Tidy Up
- Confirm we are progressing in the right direction with the changes identified
- Agree actions and timescales, including next steps for Local Plan, HEELA and Land Supply

Resulting Action Plan and Way Forward

This Priority Session revised the Action Plan originally adopted in March 2021 – as attached below.

Way Forward

1. Agree revised action plan and timescales – Directors Overview Meeting 7 December and Cabinet Briefing 22 December 2021

2. Cabinet Member for Infrastructure, Environment & Culture and Director of Place 1:1's meetings to monitor and ensure deliverability, with escalation of issues to Leaders via Cabinet & Directors Business Plan Delivery Focus Meetings: Place & Growth

3. Review Action Plan with recommendations from PAS Feedback Report when available; and provide update to Cabinet members – Councillor Morey/Kevin Mowat/David Edmondson

Revised Planning Service Action Plan

(approved O&S/Cabinet March 2021 updated by Cabinet and Directors Priority Session November 2021)

Agreed vision for the Planning Service

> The service will be efficient, engaging, proactive, and responsive. Officers will always be firm but fair and will take an appropriate interventionist approach for the benefit of the Bay**.**

Original Actions, plus Next Steps and New Actions	By when	Update Nov 2021
Engagement		
Re-establish regular Agents Forums, customer feedback ***Next steps/additional actions:*** Broaden attendance and hold additional combined Neighbourhood Forum and Agents Forums – David Edmondson; Junior officers to attend to build relationships – Wendy Ormsby	April 2021 then ongoing By January 2022 then ongoing	2 Forums held, next is on January 26th.
Greater use of Planning Performance Agreements (PPA), including the payment for dedicated officers – see additional actions under Staff Matters. ***Next steps/additional actions:*** Establish arrangement for TDA to fund PPA for TDA led projects – Kevin Mowat Progress PPA for signing for HIP2 with ICO – Cllr Steve Darling/Anne-Marie Bond	Immediately on appropriate cases January 2022 January 2022	Achieved
Greater use of the Design Review Panel, to help improve the quality of larger schemes submitted to the Council	Immediately on appropriate cases	Need to re-emphasise to team,

Next steps/additional actions: Review existing Design Review Panel and develop/embed culture of stated approach – David Edmondson/Wendy Ormsby	January 2022	only been one recently
Engagement with Neighbourhood Forums in pre-application processes *Next steps/additional actions:* 1. Continue reinforce with officers and link to joint Agent and Neighbourhood Forum Sessions (see action above) – David Edmondson/Wendy Ormsby 2. Develop joint protocol for working approach with the Council, Neighbourhood Forums and Agents – David Edmondson/Wendy Ormsby	By June 2021 Ongoing January 2022	Encouraged with developers in all meetings
Continue close partnership working with Homes England, Historic England, registered providers, NHS Partnership Trust, South Devon College, etc.	Ongoing	Ongoing regular meetings. Interventions planned in several sites.
NEW: Strengthen relationship with TDA and Planning for delivery and management of Council projects, including: - establish clear expectations required of project leads eg. PPA and how DRP will be conducted – Anne-Marie Bond/Kevin Mowat - hold monthly meetings with TDA – David Edmondson/Wendy Ormsby/Liam Montgomery	January 2022, then monthly meetings	
NEW: Review Site Visits as opportunity for to develop member/officer relations: - Review ability for physical site visits for Planning Committee urgently with Public Health – June Gurry;	Complete – Public Health advise against due to risks of covid	

- Officer sites visits required for applications unless very clear/straight forward application with no objections – Wendy Ormsby	November 2021, ongoing	
NEW: Review criteria and approach to Site Review Meetings to enable established criteria and trigger points for virtual meetings and where no resolution ability to escalate to physical visit or refer to Planning Committee. – David Edmondson/Wendy Ormsby for Cabinet members to consider	January 2022	
Members		
Member Training Programme - Including Chair's training programme **Next steps/additional actions**: Evaluate Planning Committee training following receipt PAS feedback report; Consider Planning Committee induction programme and ongoing annual training programme including specific training for Chairman of Planning Committee; Revisit Member Job Descriptions in the Constitution to build in skills and expectations David Edmondson/Wendy Ormsby/Teresa Buckley	Beginning shortly Start January 2022	Started with Historic Environment (Sept) & Role of Councillors.(Oct) Flooding & Drainage on 2nd December.
Climate change		
Sustainability Checklist for Validation purposes, enhancing the energy efficiency of proposed development.	By June 2021	Drafted by Jacqui Warren, Wendy incorporating into revised Validation Checklist
NEW : Prepare/combine Climate Change and Healthy Living in one Supplementary Planning Guidance document – David Edmondson/Adam Luscombe	By February 2022	
Staff Matters		
NEW: To resource PPAs, identify HR Strategy for recruitment, backfill and ensuring sufficient resources to	Dec 2021	

deliver PPAs quickly – David Edmondson/Wendy Ormsby/Sue Wiltshire		
NEW : Review strategy for specialist posts and purchase of services with sharing resources across neighbouring authorities to build resilience – David Edmondson/Wendy Ormsby	January 2022 and ongoing	
Establish new 'team within the team', dealing with design, public realm & historic environment issues	By June 2021	Successful
Improved Officer e-mail & telephone communication *Next steps/additional actions:* 1. PAS to deliver training on customer standards – all officers 2. Establish standards/criteria for response times and consider more use of phone calls/Teams meetings instead of emails – Wendy Ormsby 3. Introduce standard auto out of office response to manage expectations – Wendy Ormsby 4. Consider how to facilitate informal discussions between members and officers using Children's Practice Week or 'day in the life of' formats – David Edmondson/Wendy Ormsby/Teresa Buckley	By February 2022, ongoing	Ongoing, all officers on Customer Service training.
Contact with Ward Councillors regarding local applications *Next steps/additional actions:* As above	Immediately	Still needs re-emphasising
Staff development programme, avoid poaching from neighbouring authorities. *Next steps/additional actions:* Introduce new training and development package for team to enable them to deliver an excellent service (meeting vision outlined above), including potential of setting up Planning Academy (similar to our Social Worker approach working with Plymouth University), to ensure staff feel valued – David Edmondson/Wendy Ormsby	July 2021 Start January 2022, ongoing	Retained all staff to date. Opportunity being offered to one who nearly left.

Embed the new culture in the recently started new planning staff.	Immediately	Achieved with June & Trenton, started with Carlo.
NEW : Undertake options appraisal for meeting conservation statutory functions, including training and development for wider team on conservation/heritage matters as well as dedicated officer – David Edmondson/Wendy Ormsby	By February 2022	
NEW: Housing Enablement (viability assessments) to be delivered by the Council to achieve transparency. Review approach adopted by Exeter and Plymouth. – David Edmondson	By February 2022	
Embed the new culture in the recently started new planning staff. *Next steps/additional actions:* Prepare specialist induction for new Planning Staff – links to training and development plan above.	Immediately	Achieved with June & Trenton, started with Carlo.
Administrative support/Validation/Digitalisation		
Filling Vacant Administrative post	April 2021	
Trial the outsourcing of the Validation process, following Business Process Mapping recommendations. *Next Steps/additional actions*: Identify resource needs and solutions to resolve short term capacity issue, including looking at other councils' approach, to make changes within 6 months and to enable the service to progress – Martin Phillips/Kevin Mowat/David Edmondson/Wendy Ormsby Review following PAS feedback report, to identify firm proposals for validation process, staff resource requirements and where this sits within the planning team's structure – David Edmondson/Wendy Ormsby	April 2021 December 2021 By February 2022	Pulled out of this, pending PAS work and changing Role Profiles building more flexibility.
Temporary additional cover for Land Charges Team, to handle backlog and high demand due to Stamp Duty Holiday.	Started	Cover worked incredibly well and supported the team.

Installation of new Land Charges back office System	By June 2021	Govt finance coming our way which will help pay for it.
Further digitalisation of information to allow for faster delivery of Land Charges Searches	Six months	Linked to the above.
Establishment of the Exacom new back office Section 106/CiL system. ***Next steps/additional actions:*** Set up project board (to include interface with wider Council teams) and prepare detailed project plan to ensure delivery. Consider wider digitalisation across Planning service, prepare scope for project and link as sub-set of CRM Project Board. – David Edmondson/Wendy Ormsby	Started By February 2022	Nearly in place.
Other		
NEW: Prepare Section 215 action plan		

PAS
planning advisory service

Torbay Council

Development Management Review

December 2021

Contents

1.0 Introduction and Scope of the Report

1.1   The Planning Advisory Service (PAS) is part of the Local Government Association (LGA). PAS provides high quality help, advice, support and training on planning and service delivery to councils. Its work follows a 'sector led' improvement approach, whereby local authorities help each other to continuously improve.

1.2   The person undertaking this review is Peter Ford. Peter is a Principal Consultant at the Planning Advisory Service (PAS) and heads up the Development Management programme at PAS. Prior to joining PAS Peter was the Head of Development Management at Plymouth City Council and held that post for 12 years up until April 2021.

1.3   The review looks at three distinct aspects of Torbay's Development Management service:

Part 1: Registration and validation

A review of the current practice for registering and validating applications and how it can be made quicker and more effective to provide a better customer service. The work has involved detailed discussions with key individuals, an analysis of the current practice and assessment into why various recent process changes have not translated into improved performance.

Part 2: Staff structures

A review of the existing staff structures and role profiles against the existing and likely future work programme for Development Management. The work has involved discussions with managers and individual members of staff to understand their workload pressures alongside wider Council priorities for delivering an effective Development Management service. A detailed review has taken place of workload metrics such as application numbers, enforcement cases, appeal work etc. These metrics have helped assess the current staff capacity against what might be considered reasonable for the volume and type of work in Torbay.

Part 3: Customer service training

Interviews have taken place with a wide range of customers of the Development Management Service. This has included developers and agents; Council Members; Neighbourhood Forums; resident associations; and Council staff. A total of 16 separate interviews took place. This feedback has been used to undertake customer service training with staff in the Development Management service and the details of this training is appended to this report.

1.4   One of the issues that was regularly reported during the interviews for this Development Management review was that Torbay has a tendency to put a "sticking plaster" over problems without achieving fundamental change. Whilst this review is very selective in its scope, it is hoped that it will have a real impact on moving Torbay forward in improving the quality of its Development Management service.

1.5   There was very positive engagement from all participants at Torbay. There is clearly real passion among staff to do a great job and to support each other. This high level of morale against a position of high workloads and recognition that improvements are needed is a real testament to the quality of staff employed at Torbay. All those interviewed were friendly and welcoming and engaged fully with the process and are thanked for providing their honest opinions and feedback.

Key Recommendations

Registration and validation

R1   Supplement the current practice of one-to-one instruction of registration procedures with simple guidance notes using annotated screen shorts from the relevant sections of the IDOX system. Use best practice from other LPAs to reduce the burden of work.

R2   Review the allocation of responsibilities for validation so that either more responsibility is given to the Planning Support Team to carry out the more procedural aspects of validation or validation is clearly identified as a responsibility for specific officers as part of their work programme. There should be a clear allocation of responsibility to avoid uncertainty and duplication. These responsibilities should be appropriate for the grade and clearly and consistently implemented.

R3   Implement the Enterprise module in Uniform IDOX or a similar project management tool to reduce double handling, excessive use of emails and increase the speed of the decision making process throughout the lifetime of a planning application.

R4   Review the current Local Validation List in line with NPPF (para.44) requirements and to improve its access for non Planning specialists. Review the Council website to ensure that older versions of the Local Validation List are removed from view.

R5   Review the content of the invalid letter to enable it to be more informative and customer friendly for the applicant and enable greater flexibility for self help through website links.

Team structures and responsibilities

R6   Review the existing team structure so that the existing Principal Planners have formal line management responsibilities for the Planning Officers, emerging Planning Enforcement Officer post and Assistant Planning Officer posts. To compensate for this additional responsibility it will be important that the Planning Officers have the necessary skills and career progression to manage a more complex caseload.

R7   Review the Assistant Planning Officer role so that it can be used more effectively as a career platform for entry level Planners and can make best use of the RTPI apprentice route to professional Planning qualifications.

R8   Review the role of Principal Planner (Delivery) to better align the post to the strategic priorities in the Local Plan and to support the promotion of PPAs to fund proactive partnerships with key developers in Torbay.

R9   Review all the role profiles in the Customer Service and Planning Support Team to better reflect the actual work that the team undertakes and also resolve the current confused roles and responsibilities.

R10   Complete the creation of a new Planning Enforcement Officer using one of the existing Planning Officer posts to fund the post. In addition add Planning Enforcement work either as a second Planning Enforcement Officer post or as part of the Planning Officer job description to create a more flexible workforce.

R11   Increase the existing heritage expertise within Development Management by either increasing the skills of existing Planning Officers or employing a separate heritage specialist

who can advise on more complex matters and act as the case officer for such applications when appropriate.

R12   Consider the direct employment of specialist officers such as Heritage, Urban Design, Ecology, Landscape or Trees based on the basis of a value for money exercise using the current costs of procuring these skills as a reference point. As an alternative give consideration to shared arrangements with neighbouring authorities.

R13   If as a consequence of recommendation R12 specialist officers are employed directly either create a line management structure through an existing Principal Planner post or create a separate team within the Planning service.

Customer service

R14   Undertake a follow up reflective session following the customer services training held on 8th December 2021 and agree a plan of action that will follow the learning points from the training. Communicate the learning points and actions to key consultative forums such as the Neighbourhood Plans forum and Local Agents' Forum.

2.0   Background and Current Situation

2.1   There has been a number of changes in the senior management team at Torbay Council in recent years that has impacted on the Planning service including a new Assistant Director and Service Manager. Further changes are being made to better reflect the actual work programme within Development Management including the establishment of a Planning Enforcement Officer post.

2.2   Torbay has also undergone a number of reviews that have involved different parts of the Planning service. This included a review of the Development Management service by Plymouth City Council in 2017, a process mapping exercise for technical support functions undertaken by T Impact, a workforce planning exercise undertaken by the LGA and an internal Business Process Mapping exercise.

2.3   The detailed Development Management review work followed a Planning Committee Member training event on 12th October 2021 organised through PAS with Peter Ford acting as the lead trainer.

2.4   This Development Management review aims to complement and build upon the work that has already been undertaken by suggesting practical actions that can be implemented by the Planning service to improve the speed and quality of the Development Management activity. However it is unclear from discussing these previous reviews with staff and stakeholders how they have translated into significant change in Torbay Planning over recent years and there is a clear frustration from some staff that issues and suggestions raised by them do not translate into any tangible change. It is hoped that this review will have a greater impact.

2.5   The Covid19 pandemic has had an adverse impact on the service in common with all Local Planning Authorities in the country. At the start of the pandemic the Council needed to change quickly to remote working and there remain some issues with the current arrangements which are less than satisfactory. It also coincided with a national trend for increased numbers of planning applications and enforcement activity that has put an additional strain on staff. In addition to the temporary impact on workflow some members of staff found these changes stressful and disruptive at times and this has inevitably affected performance.

2.6   On a more positive note the need to work from home due to Covid required the Development Management team to move from a reliance on paper to digitising the Development Management process. This has saved time in the need for scanning information and the promotion of electronic submissions by applicants. Whilst this has accelerated the use of the Uniform IDOX software (Planning software used by Torbay Council) capabilities it has also required staff to change their processes and to quickly learn a different approach to working.

3.0   Registration and Validation

3.1   Registration and validation is an area of particular concern to most of the customers interviewed as part of the Development Management review work and in particular to the Planning agents. There was overwhelming feedback that it is a weak link in the decision making process. Comments were made that the process is very slow and impersonal. There were comments about the difficulty of getting officers to engage in discussing reasons for applications being invalid and reasons being "petty" and inconsistent.

3.2   The use of the Planning Portal is quite widely used with applicants with an average of 79% of applications submitted via the Planning Portal over the last two years and Torbay uses the Uniform IDOX software package that is compatible with Planning Portal submissions. This should, in theory at least, make the registration of the majority of planning applications efficient and fast.

3.3 Information on validation performance shows that validation is relatively slow and this has worsened over recent years. For example, planning applications categorised in the 'Other' category have deteriorated from an average of 11 days to validate in 2019/20 to 23 days in 2021/22. However, interestingly Major applications are clearly being prioritised with an average of 13 days to validate in 2021/22. This was confirmed by staff as a conscious decision to prioritise Major applications. However, the speed of validation is clearly a major issue for the Council and a sector wide benchmark indicates that Councils should aim for an average of 5 working days for all planning applications. If applications are taking over 20 days to validate it becomes extremely difficult for Torbay to meet the threshold of 8 weeks to determine non Major applications.

Registration

3.4   By observing the work of a Planning Technician it appears that the registration of a planning application is clear and quite straightforward, particularly when an application is submitted from the Planning Portal. A member of the team can clearly see from the document management system the applications that require registration and work through each application in a systematic and largely chronological order.

3.5   The use of the IDOX Uniform software system appears to be clearly understood and the officer spoken to was comfortable in understanding what needed to happen to move the application from the registration to validation stage. There was a very helpful pre- validation checklist that was self populating that enabled the Planning Technician to check that all the required information had been populated and the checklist also created an area for the Planning Technician to place any notes that would be helpful to the validating officer. These notes were very helpfully highlighted in large type and in red so that the flow of information could be quickly be disseminated from one officer to the other.

3.6   Whilst the process of registration was very efficient and competently carried out there were some issues that were a concern and these are outlined below.

3.7   There appears to be no writtenprocedures for registering a planning application and reliance is placed on new staff being taught the process through one-to-one instruction and officers making their own notes. Whilst one-to-one tutoring is very good practice and ensures that a new officer understands their role and the procedure, it is very unusual that there are no written guidance notes. Therefore the manager is totally reliant on the officer remembering what they have been taught. Furthermore when another new member of staff joins the team they will be relying on their tutor retaining all the best practice they have themselves been taught and not inadvertently passing down bad / inefficient practice.

3.8 Simple guidance notes could help to ensure that registration is carried out consistently and expediently and would usefully supplement the one-to-one instruction. These can be very straightforward using screen shots as illustrated below and if necessary officers could ask staff at other Planning Authorities to share guidance notes for adaption as Uniform IDOX is commonly used by Planning Authorities and similar guidance notes are prepared by most of these Planning Authorities.

Reception/Validation

You only have three fields to complete here. The (9) Development Type, enter the code. Now (10) to show the decision level, this is either Delegated or Committee. And finally (8) validation date (for todays date, just double click) any other date you will need to enter as follows **dd.mm.yy**; this will be the date the last piece of information was received.

The system will send a message to Tech Support to now send out the Acknowledgement Letter to the applicant/agent. **You do not have to do any more on the validation side.**

3.9   Anecdotally the Planning Technician who was interviewed advised that it takes approximately half an hour for a very straightforward application to be registered and for a Major planning application it can take up to a day. During this registration time the officer will helpfully pick up any issues that they consider would invalidate an application (for example wrong fee, incomplete red line, no North Point etc). This information is then recorded in the pre validation checklist. However, there is no formal procedure for a Planning Technician to register validation issues even though checking such information is unlikely to take any more of the officer's time.

3.10   If Planning Officers are to remain the validating officers it might be helpful if the Planning Technician could pre check certain clearly defined procedural validation issues as part of the registration process and thus reduce the amount of time taken by the validating officer. The extent of this pre check would be a matter for the management team to agree but a simple checklist could be added to the pre validation checklist to cover these matters.

3.11   The period between registration and validation is further hindered by the need for the Planning Technician to email the pre validation list to the Planning Support Team Leader who then undertakes a cursory check before emailing the Development Management Service Manager. The Development Management Service Manager then allocates the application to a case officer to validate the application. This all takes time and is dependent on the availability of the managers to act. Whilst the individuals concerned are clearly very diligent the process relies on this diligence and also perpetuates a culture of checking other people's work, even though it appears that very little actual checking is carried out at this stage.

3.12   The reason for the inefficient email system of communication appears to be because the IDOX project management tool known as Enterprise has not been set up for Planning even though it has been purchased. This seems to be a false economy, as the Enterprise tool would significantly improve the efficiency of the validation process and avoid the need for any email traffic. Alternatively another project management tool could be introduced to do a similar as Enterprise. There would be no need for any emails to be sent and the Service Manager could either assign applications to officers directly or simply delegate to another officer when necessary. There appears little value in the double handling through the Team Leader and, if felt appropriate, the Team Leader could undertake a quality check through Enterprise at any point in the process if the Enterprise software was used.

Validation

3.13   Validation currently forms part of the responsibilities of different Planning Officers. However, it was previously undertaken as part of an individual's responsibilities (although not on a formal basis), then a Service Manager took up the role. Further consideration is now being given to this role. Different LPAs manage validation in different ways and it is based on the team structures set up for each LPA and the skill set within those teams. There are four key principles that should underline the decision as to who carries out validation:

1. Validation should not look at the quality of an application and a large part of the validation process is procedural, using checklists and therefore can be carried out without detailed knowledge of the decision making process.
2. There is, nevertheless, a need for some judgement calls on whether the information is sufficient to allow the application to proceed without prejudicing the ability for all interested parties to understand and comment on the application. When more complex planning applications are validated they often cannot be based entirely on a checklist.
3. The process needs to be clear, transparent and consistent so that an applicant understands what is required to make the application valid and is treated fairly.
4. The process needs to be quick so that statutory performance targets can be met and acceptable development is allowed to proceed without delay.

3.14   Applicants have indicated to me that there is value in case officers validating planning applications as it ensures that they have ownership of their application at an early stage in the process.

3.15   A Local Validation List is published on the Council's website and appears to be thorough and comprehensive. However it is dated from 2018 and therefore should be updated at least every two years in accordance with NPPF (para.44) and this is particularly relevant to Torbay because of the importance given to Neighbourhood Plans that were largely absent in 2018. Torbay's Local Validation List is difficult to navigate for a non

Planning specialist and this could be improved with a more interactive document. In section 7 there are some examples of best practice. Also there appears to be an older, and less helpful, Local Validation List that appears on the first Google search.

https://www.torbay.gov.uk/DemocraticServices/documents/s12375/Local%20Validation%20Lists%20Appendix%201.pdf

3.16   The current invalid letter sent out to applicants has raised a number of issues with applicants as it is perceived as impersonal and insufficiently informative. There are a number of observations that can be made about the invalid letter as it is currently drafted.

- There is no link to enable the applicant to address missing validation information. An improved Local Validation List could include links to information that would help the applicant and these links could either be placed in the invalid letter or a simple link to the Local Validation List could be provided.
- There are no contact details except for a generic validation email address. Validation requirements can often be resolved very quickly with a phone call to the case officer or a validation officer.
- Many general enquiries about validation could be addressed through a website "Question and Answer" section and a link to this section of the website could be placed in the invalid letter.

3.17   Officers advise also that the current system of communication by email means that applications are sometimes "lost" between Planning Support and the case officer and this creates further delays in the validation process and therefore the determination time. Officers advise that this is a common reason for the need to ask for an extension of time.

3.18   Validation, similar to the registration process, does not include any written down procedures and therefore is reliant on one-to-one instruction and officers making their own notes. Whilst this does not appear to have caused a problem in recent times simple guidance notes with screen shots from IDOX could improve consistency and expediency to supplement the one-to-one instruction. Furthermore the introduction of Enterprise or a similar project management tool could speed up the validation process, avoid errors, excessive use of emails, applications being lost in the system, double handling and unnecessary checking of officers' work.

4.0 Team structures and responsibilities

4.1   Currently there are 11 members of staff within the Development Management team including: 2 Planning Assistants; 5 Planning Officers; 3 Principal Planners (including a 'Delivery' Planner); and a Service Manager. Within the Customer Service and Planning Support Team there are 9 members of staff (excluding Land Charges specific staff), including: 4 Technicians; a Planning Obligations S106 / CIL Officer; a Service Development Technician; a Team Leader Service Development; a Team Leader Service Support; and a Service Manager – support. However progress is being made for one of the Planning Officer posts to be changed to a Planning Enforcement Officer post and all the Planning Support posts are under review.

4.2   One of the issues with the Development Management team is the lack of a clearly identified team structure, but from the job descriptions all posts appear to report directly to the Service Manager.

4.3   When considering workload capacity it is very difficult to make a clear assessment at this point in time due to the very unusual circumstances that have resulted from Covid. Last year in particular was a very unusual year because there was a sharp drop in planning activity at the start of the pandemic. This was followed by a higher than usual workload during the second half of the year with a particularly high volume of householder applications and enforcement investigations. However below is a best fit assessment of Torbay's development management caseload

Activity	2020/21 figures	Average over last 3 years	Average over last 5 years
No. of householder pre apps received	74	68	
No. of non householder pre apps received	87	74	
No. of Major applications determined	15		
No. of non Major applications (exc. Conditions, prior approvals, LBCs, LDCs etc)	705		
Major appeals considered	1	2	
Minor appeals considered	17	22	
Other appeals considered	25	35	
Enforcement enquiries received	327	301	302

4.4   With the number of staff in the Development Management Team and Customer Service and Planning Support Team the volume of staff looks reasonable. It is very difficult to accurately forecast the number of staff needed for a Development Management service because it is so dependent on the types of applications received and priority that is given to matters such as pre applications and Planning Committee.

4.5   The number of appeals is relatively high for a Council of the size of Torbay and 37% of the appeals were upheld in 2020/21 which is above average. There are also a very high number of applications that are "live" and some of these date back prior to April 2019. On 18th November 2021 there were 369 live applications.

4.6   The number of applications and associated work received at Torbay should enable workloads to be manageable at Torbay and not exceed the rough benchmark for an acceptable caseload of up to 40 – 50 cases (including all work) or 150 cases per year. However it is complicated by the large number of live applications that are carried over year to year and the relatively large number of appeals.

4.7   The Development Management Team has a good range of officers from Assistant Planning Officers dealing with simple, non complex applications, to Planning Officers who deal with the mid range applications, to Principal Planning Officers who deal with the more complex applications and have some supervisory responsibilities, to the Service Manager

whose role is to ensure the effective operation and management of Development Management.

4.8   However, the team has a very flat structure with all post reporting to the Service Manager. This means that ten members of staff report to the Service Manager which is? High, particularly considering the strategic level that the Service Manager must operate at. However, the Principal Planners have line management responsibilities and therefore it would seem reasonable that a better structure might be for the Principal Planners to report to the Service Manager with other officers in the team reporting to one of the Principal Planners. See below for further implications of such an arrangement.

4.9   The role profile for the Assistant Planning Officer post is rather unusual for a Development Management Team. This would normally be an entry level position for a Planning graduate, but in Torbay's case it is pitched at a much lower level requiring only GCSEs. This could be seen as quite a bold statement by Torbay indicating quite rightly that the most simple planning applications do not need a qualification in Planning and would be an opportunity for a Support Service Technician to develop their career in Planning. However, it is pitched at such a low level that an Assistant Planning Officer is never likely to progress to a Planning Officer since this post is at a considerably higher grade (from F grade to I grade) and requires a Planning qualification or equivalent. Therefore any aspirations to 'grow your own' is unlikely to be successful.

4.10   An alternative approach could be to grade the Assistant Planning Officer post at a higher level where at least A levels are required and include a career grade structure – possibly grade F to H – to encourage Assistant Planning Officers to gain greater experience and pursue professional qualifications through a degree / post graduate Planning route. The Planning Apprentice route is the most obvious opportunity for Assistant Planning Officers to progress their careers and this is operated through the RTPI and through local University Planning Schools such as the University of Plymouth.

4.11   The Planning Officer and Principal Planner responsibilities provide a clear career path for a Planner to progress in levels of experience and responsibilities with the Principal Planner taking on additional supervisory responsibilities for more junior staff. However it is important to ensure that the balance of senior to more junior positions is maintained based on the volume and type of applications received. If, as suggested in this report, Principal Planners take on greater management responsibilities it will be important that there are sufficiently skilled Planning Officers to deal with the more complex planning applications. It is also important that the career grading is used effectively to allow a Planning Officer to gain in experience and responsibility.

4.12   The Principal Planner (Delivery) is a proactive delivery role and one that enables one of the Principal Planners to step away from a mainstream Development Management role and focus on a small number of key regeneration projects. However, it is unclear how this post operates in practice and how a project is defined for this post rather than the other Principal Planners. A clearer link with the Strategic priorities within the Local Plan could be a way of better articulating the purpose of this post. Also, as the post is linked to Planning Performance Agreements (PPAs), the post could also be used as a way of funding additional posts as and when appropriate based on the success of negotiating PPAs for specific key regeneration projects.

4.13   Curiously the post of Principal Planner (Delivery) appears to have a role in reviewing the Council's website. It is clearly beneficial that this role helps to promote inward investment to Torbay and the website can help to achieve this. However it could be

interpreted that this role is responsible for maintaining and updating the website that would seem inappropriate.

4.14 It is difficult to draw too many conclusions from the Customer Service and Planning Support Team structure as the team covers a greater area of responsibility than simply Development Management and some of the job descriptions appear very out of date. However these job descriptions are currently under review which is positive and an opportunity to better define the roles where they are associated with Development Management.

4.15 The rationale behind the Customer Service and Planning Support Team seems to be a good one whereby the team covers a range of activities including Development Management but also wider Planning areas and Land Charges where staff can be deployed as required. However in practice this seems to fall down as is illustrated by the issue of validation where the Service Manager appeared to be undertaking this role even though it does not seem to appear on any job description either in the Customer Service and Planning Support Team or the Development Management Team. Validation is addressed in section 3 but is an indication of confused job roles manifested in clearly out of date job descriptions that need a major overhaul.

4.16 It is positive that progress is now being made to create a Planning Enforcement Officer post as this is an obvious gap in the current team structure. Planning Enforcement is an essential and high profile area of Planning that gains particular attention by councillors and so it is important that it is properly acknowledged in job descriptions either as part of a wider generic Planning Officer job description or a separate job description.

4.17 At present there is clearly a resource issue with Planning Enforcement with 343 live enforcement cases open in November 2021 and an average of over 300 cases received each year which is fairly typical for a Council of the size of Torbay . Planning Enforcement is usually most effective when it is a clearly defined role that individuals undertake as their main activity rather than being part of a wider function such as a generic Planning Officer title.

4.18 It appears that the current proposal is for one separate Planning Enforcement Officer to be identified in the structure. However one post could potentially create a "single point of failure" situation whereby only one individual has the knowledge and training to undertake Planning Enforcement work. Therefore consideration should be given to having two Planning Enforcement Officer posts and the current workload would certainly justify two dedicated posts. Another alternative could be to have a defined Planning Enforcement Officer but also to include Planning Enforcement within other Planning Officer job descriptions. In this way any Planning Officer could be asked to undertake Planning Enforcement as part of workload management and will also be able to substitute for the Planning Enforcement Officer as necessary. This is not an ideal scenario as outlined in para. 4.17 but could be a pragmatic solution if there are budgetary constraints.

4.19 The responsibility for determining Listed Building applications and advice on heritage falls within the various job descriptions when previously Torbay employed its own heritage expert. Raising the skills of Planning Officers to consider heritage matters is a positive approach and many listed building matters can be addressed without specialist advice. However Torbay has over 850 listed buildings and 24 Conservation Areas. With such a rich heritage it is difficult for a Development Management Planner to have the necessary skills to assess the different heritage issues in Torbay and consideration should be given to either

provide existing Planners with the necessary training to lead on heritage matters or employ a separate heritage specialist.

4.20   Linked to the point above regarding heritage specialism is the lack of other specialist skills either within Development Management or elsewhere in the department. In particular specialisms in urban design, ecology, landscape and trees. Many of these skills are procured at Torbay through service level agreements and other consultancy frameworks. However it is questionable whether this provides value for money. These skills are needed on a regular basis in a Council the size of Torbay and will continue to be needed in the future. Thought should therefore be given to either employing specialists or negotiating a shared arrangement with neighbouring authorities.

4.21   If a decision was made that it was cost effective to employ specialists rather contract the specialism the posts could either be employed within a separate team within the Planning service or within the Development Management Team under the management of one of the Principal Planners. The advantage of being located within the Development Management Team is that the more senior posts are already in place and there is likely to be better synergy with the work of Development Management. However if Principal Planners are to take on these extra responsibilities then workload management will be an issue as the Principal Planners are critical to ensuring that the service has sufficient skills for the more complex planning applications.

4.22   It is positive that a Planning Obligations (CIL / S106) Officer is in place within the Planning Support and Customer Services Team. This should ensure that the collection of CIL and S106 payments can be properly managed, monitored and enforced. It is important that through the review of the Team Leader and Service Manager job descriptions that this role is properly managed so that a "single point of failure" position does not arise and that other officers can ensure the smooth running of this essential process in the absence of the Planning Obligations (CIL / S106) Officer.

5.0 Customer service

5.1   The customer service that officers provide at Torbay has been reviewed through interviewing a wide range of customers and also by looking at performance data. A workshop was held on 8th December 2021 where officers in the Development team reflected on the needs of their customers and the feedback received from customers. The issues and outcomes are summarised in a customer services presentation – see appendix 1

5.2   Officers actively participated in the customer services training and reflected on the things they do well and where there are learning points. All the individuals interviewed to inform the training felt the initiative was positive and were keen to see the outcomes of the training. In the same way officers emphasised that they were keen that the customers of the service should also learn from good customer service practice.

5.3   It is important that this customer service training is followed up through discussions both amongst officer and between officers and customers to agree how behaviours may change in the future. Useful forums for such discussions could include staff meetings, the Neighbourhood Plan forum and Local Agents' Forum.

6.0 Overall Conclusions

6.1   The Development Management service at Torbay Council has, and is, going through a major period of change. There have been significant new appointments in the last couple of years that has improved management capacity. Other shortfalls in the team structures are being addressed and include a new job description for Planning Enforcement and the updating of the Planning Support role profiles.

6.2   Staff continue to be motivated and professional in the way they deal with clear pressures in their workload and have adapted very well to the changes that have been required during the pandemic. Staff are to be congratulated for their efforts in this respect.

6.3   One of the underlying themes expressed through the interviews undertaken was the "sticking plaster" approach Torbay Council appears to have with addressing problems particularly in the Development Management service. This was expressed as trying to fix individual problems when they arise rather than looking at the whole service and how the different elements of the service interlink. The brief for this review could be perceived as perpetuating this approach by just looking at parts of the Development Management service rather than the service as a whole and therefore it is essential that this review is considered as part of a wider review of Development Management in Torbay.

6.4   Another underlying theme raised in many interviews and with some staff in particular is that Torbay Planning is slow to implement change with many issues and suggestions not acted upon. It is hoped that the practical suggestions raised in this report are deliverable and achievable.

6.5   The registration and validation process operates effectively but there are some clear areas where it could be improved. It fails to take advantage of project management tools that Torbay has procured through Uniform IDOX or similar tools. The reasons given are due to capacity reasons even though the implementation of a project management tool would free up capacity. Therefore the validation process is slowed down by multiple handling and email communication that is reliant on the diligence of individual officers rather than letting technology help.

6.6   Registration and validation is also significantly hindered by the lack of any written instructions or manuals and therefore the quality and speed of the process is entirely dependent on one-to-one tutoring and individuals remembering how to carry out a task. This is very unusual and means the process is susceptible to errors and bad practice due to no fault of any individuals concerned.

6.7   It is also hindered by the lack of self help information on the Council's website and an out of date and difficult to use Local Validation List.

6.8   The responsibilities for validation are very confused and appear to change on a regular basis not on the basis of efficiency but on the basis on finding individuals able and willing to carry out the task. This has clearly caused resentment with some staff. There is no one right solution for the responsibility for validation but it is essential that a decision is made and that the responsibilities are reflected in job descriptions. It is also important that the decision does not create a "single point of failure" situation that seems to have been the case in the past.

6.9   The number of staff available to undertake the volume of planning applications and enforcement cases seems reasonable but there needs to be a review of all the posts to ensure that officers have the right skill set to manage the type of applications / enquiries

received. The Assistant Planning Officer role is at a very low level and not appropriate for planning applications of any complexity. If the Principal Planners are to take on a greater level of responsibility it is important that capacity is drawn from the Planning Officer roles and it is important that Planning Officers have the correct skills to deal with more complex applications. The introduction of Planning Enforcement Officers will be a positive one but it is really important that it does not result in a "single point of failure" position.

6.10 Regarding Planning Support the key issue is one of clarity of roles and responsibilities and a review of all job descriptions is therefore urgently needed so that staff are carrying out work appropriate to their grade at all levels within the team and there is not a "single point of failure" issue.

6.11 There is a clear lack of specialist support within the Planning teams and this has been compensated either by procuring external support or simply asking Planning Officers to do more. It is questionable whether this is a good use of resources and cost efficient and, as with most LPAs in Torbay's position, a better balance of in-house resources supplemented by shared arrangements and external procurement is likely to be beneficial.

6.12 There are clearly issues with customer service but also some excellent practice provided by staff and the workshop held on 8th December 2021 hopefully helped staff to gain skills to improve customer service. It is now important that the learning points from the training are reflected upon by staff and help to improve relationships with the customers of the Development Management service.

7.0. Further support

7.1 A range of support from PAS is available at https://www.local.gov.uk/pas.

7.2 Planning Advisory Service (PAS) support offers:

Planning Committee Support

7.3 The Planning Committee section of the PAS website contains lots of advice and hints and tips on running good planning committees.

Development Management Training & Materials

7.4 There are a range of tools available on the PAS website to help improve your Development Management Service. In particular the following may be of help.

Development Management Challenge Toolkit provides a health check for your Development Management service and covers 15 separate topic areas. It includes a specific section on registering and validating planning applications

Good Development Management practice provides practical tips for Development Management

Other best practice examples

Use of websites to provide frequently asked questions

St. Albans City and District Council https://www.stalbans.gov.uk/planning-faqs
South Staffordshire Council https://www.sstaffs.gov.uk/planning/planning-advice-2.cfm
Spelthorne Borough Council https://www.spelthorne.gov.uk/article/17709/Planning-applications-FAQs

Examples of good Local Validation Lists

Plymouth City Council https://www.plymouth.gov.uk/sites/default/files/ValidationList.pdf
Doncaster City Council https://www.doncaster.gov.uk/services/planning/how-do-i-apply-for-planning-permission
North Devon Council https://www.northdevon.gov.uk/planning-and-building-control/making-a-planning-application/the-local-list/

Appendix 1 – Customer service skills presentation

Planning Advisory Service (PAS) Recommendations
from the Project Initiation Document (PID)

PID Project Scope & Exclusions

The initial scope of the Project includes:

a) How we deliver services, which may include reconfiguration and changes in some cases (including how we use people, processes and technology);
b) How we provide training and development opportunities across all of the Service;
c) How we communicate as a Service.

The scope includes considering the PAS recommendations, as detailed below:

PAS Recommendation	Notes re Improvement Plan
Registration and validation	
R1 Supplement the current practice of one-to-one instruction of registration procedures with simple guidance notes using annotated screen shorts from the relevant sections of the IDOX system. Use best practice from other LPAs to reduce the burden of work.	Covered in Improvement Plan (Appendix 1, Planning Applications)
R2 Review the allocation of responsibilities for validation so that either more responsibility is given to the Planning Support Team to carry out the more procedural aspects of validation or validation is clearly identified as a responsibility for specific officers as part of their work programme. There should be a clear allocation of responsibility to avoid uncertainty and duplication. These responsibilities should be appropriate for the grade and clearly and consistently implemented.	Covered in Improvement Plan (Appendix 1, Planning Applications)
R3 Implement the Enterprise module in Uniform IDOX or a similar project management tool to reduce double handling, excessive use of emails and increase the speed of the decision making process throughout the lifetime of a planning application.	Covered in Improvement Plan (Appendix 1, IT Systems)
R4 Review the current Local Validation List in line with NPPF (para.44) requirements and to improve its access for non Planning specialists. Review the Council website to ensure that older versions of the Local Validation List are removed from view.	Need to include in Improvement Plan

PAS Recommendation	Notes re Improvement Plan
R5 Review the content of the invalid letter to enable it to be more informative and customer friendly for the applicant and enable greater flexibility for self help through website links.	Need to include in Improvement Plan
Team structures and responsibilities	
R6 Review the existing team structure so that the existing Principal Planners have formal line management responsibilities for the Planning Officers, emerging Planning Enforcement Officer post and Assistant Planning Officer posts. To compensate for this additional responsibility it will be important that the Planning Officers have the necessary skills and career progression to manage a more complex caseload.	Covered in Improvement Plan (Appendix 1, Resourcing)
R7 Review the Assistant Planning Officer role so that it can be used more effectively as a career platform for entry level Planners and can make best use of the RTPI apprentice route to professional Planning qualifications.	Covered in Improvement Plan (Appendix 1, Resourcing)
R8 Review the role of Principal Planner (Delivery) to better align the post to the strategic priorities in the Local Plan and to support the promotion of PPAs to fund proactive partnerships with key developers in Torbay.	Covered in Improvement Plan (Appendix 1, Existing Planning Service Action Plan)
R9 Review all the role profiles in the Customer Service and Planning Support Team to better reflect the actual work that the team undertakes and also resolve the current confused roles and responsibilities.	Covered in Improvement Plan (Appendix 1, Resourcing)
R10 Complete the creation of a new Planning Enforcement Officer using one of the existing Planning Officer posts to fund the post. In addition add Planning Enforcement work either as a second Planning Enforcement Officer post or as part of the Planning Officer job description to create a more flexible workforce.	Not applicable. Superseded as covered in Improvement Plan (Appendix 1, Resourcing)
R11 Increase the existing heritage expertise within Development Management by either increasing the skills of existing Planning Officers or employing a separate heritage specialist who can advise on more complex matters and act as the case officer for such applications when appropriate.	Covered in Improvement Plan (Appendix 1, Resourcing)

PAS Recommendation	Notes re Improvement Plan
R12 Consider the direct employment of specialist officers such as Heritage, Urban Design, Ecology, Landscape or Trees based on the basis of a value for money exercise using the current costs of procuring these skills as a reference point. As an alternative give consideration to shared arrangements with neighbouring authorities.	Covered in Improvement Plan (Appendix 1, Existing Planning Service Action Plan)
R13 If as a consequence of recommendation R12 specialist officers are employed directly either create a line management structure through an existing Principal Planner post or create a separate team within the Planning service.	Covered in Improvement Plan (Appendix 1, Existing Planning Service Action Plan)
Customer service	
R14 Undertake a follow up reflective session following the customer services training held on 8th December 2021 and agree a plan of action that will follow the learning points from the training. Communicate the learning points and actions to key consultative forums such as the Neighbourhood Plans forum and Local Agents' Forum.	Covered in Improvement Plan (Appendix 1, Customer Service)

Exclusions

The exclusions for the project include:

- The implementation of the Carbon Neutral Torbay Initial Action Plan for tackling climate change. This is excluded as it is already covered by existing activities. However, the resource requirements within the Climate Emergency Service is in scope as part of 'How we deliver services.'
- Business as usual (BAU) activity identified in the current Action Plan for the Planning Service.

Improvement Plan

Stage Two – Improvement Plan	
Service Area	Planning, Housing & Climate Emergency
Directorate	Place
Head of Directorate / Divisional Director	Kevin Mowat / David Edmondson

Version Control

Version	Date	Brief description of amendments / changes (include item reference and section heading)	Officer
v1.00	07/12/21	Revised draft template	Russell Mercer
v2.00	15/09/22	Amendments made to Improvement Plan	Matthew Fairclough-Kay, Stuart Loly & Tim Herring
v3.00	14/10/22	Changes shown in green and include: Customer services aspects referenced in the Complaints section (Appendix A, ref 18 & 19) are removed and placed under their own section heading, Customer Service; Feedback from Service Managers reflected in updated version; PAS Recommendations in the PID, captured in Appendix A.	Stuart Loly
V3.01	26/10/22	Changes shown in yellow and include Status of Improvement Plan actions (ref 01-10 - 'Existing Planning Service Action Plan') updated by David Edmondson, so progress captured and relevant actions closed, if completed.	Stuart Loly

Outlined below is a listing of areas of improvement that have been identified using information utilised from the Stage One of the Service Review and the As Is Review (Appendix 2).

The main objective of the Project is to strengthen and build the effectiveness of the service, ensuring that each element of the service can unite behind a common purpose of becoming fit for the future, through the delivery of efficient and effective services.

Other key objectives of the Project are as follows:
a)   Continue to implement the Planning Service Action Plan, which are not business as usual activities;
b)   Implementation, where appropriate, of the PAS recommendations;
c)   Consider structure/resources within the Spatial Planning Team;
d)   To improve business resilience and productivity;
e)   To have efficient and effective management structures;
f)   To support, develop and retain staff;
g)   Create a positive and inclusive working environment;
h)   Good delivery of key performance indicators (KPIs) across all elements of the Service.

The Improvement Action Plan, as shown in Appendix 1, covers the above objectives and is to be used to record action, responsible owners and progress notes. Recommendations from the Planning Advisory Service (PAS), identified in the Project Initiation Document have been referenced in the Improvement Action Plan in brackets (e.g. [R12]).

Details of Proposed Improvements by Categories
Overview Proposed Improvement (e.g. Customer Experience, Staff Experience, Support Systems)
1.   Planning Applications
   1.1.1. Activity analysis of planning web offering. Website traffic baseline statistics to inform what is working and what may not be
   1.1.2. Activity analysis of general enquiries into the service. Recording the types of calls and emails received to provide a baseline
   1.1.3. Workshops to dive deeper into the baseline statistics gathered to support positive changes to how planning applications are received and processed
   1.1.4. Workshop to dive deeper in how we manage the function of Planning Online comments, options of moving the function to customer services or not allowing the public to comment online and all comments would be handled internally by Planning Officers dealing with the applications
   1.1.5. Resolve current issue with G-forms in relation to potential limit on file sizes, which are submitted (there is an issue with no documents received which may be due to a limit on the system.
1.2.   Complaints
   1.2.1. Fully map the process of managing complaints
   1.2.2. To Be workshop to dive deeper into the issues and provide solutions to ensure we provide a consistent approach to complaints
   1.2.3. Reset the focus on customer service and the standards set
   1.2.4. Additional customer service training
1.3.   Resourcing
   1.3.1. Review of roles and responsibilities (i.e. Job Descriptions) so they are updated where necessary, including correctly reflecting line management responsibility and reducing duplication of activities between Planning Support & Development Management
   1.3.2. Conclude process of making Technical Service Support posts, career posts. Process was paused while project was established.

1.3.3. Analysis of options & costs associated with bringing a heritage/landscape specialist in-house. Explore non FTE specialist posts (e.g. Ecology, Archaeology and Urban Designer) with Devon County Council as part of a service level agreement.

1.3.4. Explore alternative transport options, for staff, to reduce mileage claim submissions.

1.3.5. Identify non-statutory services (as unable to meet current demand) and determine if they should continue. Alternative sources of administrating could be set up e.g. e-form, self-serve.

1.3.6. Review TDA SLA, exploring needs around refreshing SLAs.

1.4. Reporting

1.4.1. Workshop to understand the informational needs of the service that would enhance upon the existing KPI set

1.4.2. Analysis of how an automated dashboard can be created to support the service and wider council

1.4.3. Set up regular Key Performance Indicator (KPI) review meetings as part of business as usual activities

1.5. IT Systems

1.5.1. Continue implementation of Planning Obligations Suite and Public Facing Module (PFM) - designed for planning and community infrastructure levy (CIL)

1.5.2. Continue replacement of Swift system, for land charges

1.5.3. Complete migration to HM Land Registry Local Land Charges Programme (LLCP) – single, digital LLC register for England and Wales.

1.5.4. Implement Enterprise Case Management workflow tool within Development Management and Planning Support

1.5.5. Resolve current system issues with CAPS Uniform (Idox) by committing Service resources to assist/review/test the work delivered by Idox

1.5.6. Explore a solution of map interrogation – MapInfo Pro (Precisely) being provided by one site to the current situation of gaining information from at least four places (e.g. Address Café; Find My Nearest; MapInfo; UNI-form)

1.5.7. Explore improving publication of Local Plan and mapping information, so it is better aligned to neighbouring authorities' approach (e.g. ARC GIS)

1.5.8. Explore integration opportunities between CAPS Uniform & W3 to reduce duplication of work

1.5.9. System capability of W3 (Civica), how does it differ from W2, is there additional functionality that can improve current usage

2. **Existing Activity**

2.1. Where a measurement is possible, a benchmark against existing activity will be taken. This will allow a greater understanding of where the improvements are being measured.

2.2. It is recommended, significant time should not be spent on creating baseline information if it is not currently available. This activity would cause delay to the overall timeframe. Therefore, assumptions may be made on improved measures.

3. **Benefits of Proposed Improvement (e.g. Financial, Performance which are specifically related to service delivery/efficiencies)**

3.1. Improved customer experience. The right information accessible on the website to support the submission of planning applications

3.2. Improved staff experience. Less general enquiries to manage and improved planning application submissions

3.3. Improved support systems

3.4. Improved IT systems to support the service

3.5. Improved reporting capability to support the service and wider council needs

3.6. Improved efficiency of staff time to process transactions (e.g., cost of processing transactions will come down)

4. Risks of Proposed Improvement

Summary	Mitigation Actions	Owner	Status*
Insufficient resources – i.e. staff and budget - to successfully implement changes	A. Review workloads and allocated dedicated time focus on the project. B. Accept and communicate that short term detriment is necessary for the long term benefit. C. Where tolerable, agree project task compromises to ensure overall success is not impacted.	Divisional Director of Planning, Housing & Climate Emergency	Open
Future changes in legislation affecting scope and shape of work for the service	A. Continued monitoring of legislation, by various Managers, in the four Service Teams. B. As Is mapping activity will define current set up and 'To Be' recommendations will be adjustable to meet the legislation/ business requirements.	Divisional Director of Planning, Housing & Climate Emergency	Work in progress
Thera are too many action plans being implemented within the Service. The Project Initiation Document (PID) included the Planning Service Action, which were not business as usual activities.	A. Combine the actions referenced in the PID into the Improvement Action Plan, as shown in Appendix 1.	Project Manager	Closed

Status Key: Open = It is currently open but has not yet been addressed; Work in Progress = It is actively worked on to develop a resolution; Closed = It is no longer an active threat and can be closed with or without resolution.

5. Service Relationships (e.g. Internal and external)
Are there any other dependencies with other services?   Yes / No / Not applicable
- *If yes provide details*

Building Control	Development Management	Planning Support	Strategy & Project Management
a) Building Regulations aspects delivered for TDA. b) For Dangerous Structures/Demolition activities, there is a close and effective relationship working with Emergency	a) This service forms part of Development & Planning Services which also includes the Planning Support team. b) There is a close relationship with Future Planning and occasionally	a) This service forms part of Development & Planning Services which also includes the Development Management Team. b) Many Council departments are internal customers as they take an	a) Team has strong relationships with Development Management, Public Health, Housing, Parking, SWISCo, TDA, as well as other corporate services such as Legal, Finance, Procurement, Governance

Building Control	Development Management	Planning Support	Strategy & Project Management
Planning, Housing Standards, Highways, SWISCo.	some duplication of work. There is consultation with the Future Planning on policies. c) There is liaison with Legal team (preparing and finalising agreements, gaining advice on Planning law, attending Planning Committees), Finance Team and Governance Support for Committee meetings (papers, member liaison).	interest in Planning, due to the links with their own services (e.g. Finance).	Support, Communications and Engagement, and Information Governance. b) Externally there is a significant relationship with Neighbourhood Forums and transport operators.

Does the proposed change impact (positively or negatively) on those with protected characteristics? ~~Yes / No /~~ Not applicable

6. Community Engagement & Empowerment
Is there an opportunity to align service design and delivery to Community Engagement & Empowerment Strategy? ~~Yes /~~ No / ~~Not applicable~~

Service Outputs
Does the proposed change impact Service Outputs? Yes / ~~No / Not applicable~~
7.1.   The following table identifies the detail captured in Stage One of the Service Review. Strikethrough text DO NOT have impacts on Service Outputs but have been left in for reference.

Building Control	Development Management	Planning Support	Strategy & Project Management
~~a) The registration and acknowledgement of Building Regulation applications~~ ~~b) Plan checking Full Plans applications~~ ~~c) Site inspection of under construction projects~~ ~~d) Responding to Dangerous Structures~~ ~~e) The processing of Demolition Notices~~	a) Improve the speed of validating and determining planning applications b) Improve communications with our customers, responding to emails and phone calls within 3 days of receipt, keeping them informed of progress with their applications/enquiries c) Implement the Heritage Strategy ~~d) Increase focus on the need for development to address climate~~	a) Tied to overall performance standards for development management b) Decisions issued within 8 or 13 weeks c) Registration timeframes (48 hrs) d) Validation timeframes (48 hrs) e) Decision issue (24 hrs from decision taken) f) Numbers of applications overturned at appeal g) Enforcement case logged (48 hrs)	**~~Transport~~** ~~a) Local Transport Action Plan (LTAP)~~ ~~b) Active Travel~~ ~~c) Rail~~ ~~d) Buses~~ ~~e) Development Contributions~~ ~~f) Electric Vehicle Charging~~ **~~Planning~~** ~~g) Local Plan Update~~ ~~h) Updated Supplementary Planning Documents~~

5

Building Control	Development Management	Planning Support	Strategy & Project Management
	~~change challenges and carbon neutral aspirations~~ ~~e) Deliver good quality new homes, including as many affordable homes as we can~~ ~~f) Create places that help people and businesses to thrive.~~ ~~g) Work with business and the community to help economic recovery post COVID~~ ~~h) Increase focus on biodiversity and environment protection and enhancement~~	h) Response to email enquiries	~~i) Support Neighbourhood Planning~~ ~~j) Lead PPA for delivery of development at Edginswell~~ ~~k) Reporting monitoring figures to Government and other agencies as required~~ **~~Climate~~** ~~m) Climate Action Plan~~ ~~n) Climate Strategy~~ **~~Housing~~** ~~o) Publication of Housing Land Supply~~ ~~p) Identification of transit site for Gypsy and Traveller community~~ ~~q) Support progress of the Housing Strategy~~ **Heritage** Utilise our built heritage – action plan for the heritage strategy

Does the proposed change impact (positively or negatively) on those with protected characteristics? ~~Yes /~~ No ~~/ Not applicable~~

8. Service Outcomes

Does the proposed change impact Service Outcomes?   Yes ~~/ No / Not applicable~~

    8.1. The following table identifies the detail captured in Stage One of the Service Review. Strikethrough text DO NOT have impacts on Service Outputs but have been left in for reference.

Building Control	Development Management	Planning Support	Strategy & Project Management
~~a) Provide an effective Building Control Service which meets the needs of our customers and stakeholders~~ ~~b) Through the application and enforcement of national legislation and technical standards, achieve~~	a) Improve customer satisfaction, facilitate economic investment in Torbay and make Torbay an attractive place to develop b) Improve customer satisfaction, reduce officer time 'wasted' dealing with complaints so they can be more	~~a) To facilitate regeneration, economic development and an improved built environment in Torbay~~ ~~b) Facilitate economic development and regeneration by enabling efficient property exchanges~~	~~a) Economic recovery and success~~ ~~b) Better connected, accessible Torbay~~ ~~c) Protect and enhance a superb environment~~ ~~d) Carbon Neutrality (including A Low Carbon Transport System)~~

Building Control	Development Management	Planning Support	Strategy & Project Management
reasonable standards of health, safety, energy efficiency, accessibility and sustainability for building users c) Maintain our market share against completion from the private sector for Building Control services	positively productive , improve trusted relationships with the community c) Deliver on the promises and commitments of the strategy, fulfil our statutory obligations, capitalise on our unique heritage. d) In response to the Council's declared Climate Emergency; in the interest of public health and well-being; to work towards becoming a carbon neutral council working with others to create a carbon neutral community. e) To provide a 5-year Housing land Supply, if possible, to allow greater community control on the location and type of housing provision; to ensure the provision of affordable and quality housing; to reduce homelessness and in the interest of the health and well-being of our community. f) To encourage inward investment, to help to create jobs and to work proactively with local businesses trying to survive the COVID crisis whilst looking forward to ensuring a long-term sustainable economy, with particular focus on regenerating and re-inventing our town centres g) In response to the Council's declared climate and biodiversity emergency, to implement re-wooding and rewilding, to address flood risks and to fulfil our statutory requirement	c) To ensure development in the bay adequately funds the infrastructure needed to facilitate it	e) Sustainable Communities and a Healthy Population f) Increase the overall supply and range of housing in Torbay and making the best use of existing housing. In particular, improving supply, range, quality, and environmental, economic and social sustainability of housing in Torbay. g) Ensure appropriate and affordable housing is available to meet people's housing needs and aspirations

Building Control	Development Management	Planning Support	Strategy & Project Management
	~~to conserve protected species and environments~~		

Does the proposed change impact (positively or negatively) on those with protected characteristics? ~~Yes / No /~~ Not applicable

9. Processes & Procedures
What processes and procedures will be impacted by proposed change?
9.1.   Explore reducing the scheme of delegation for Governance process for local variations, with less stakeholders involved, so timeframes could be reduced.
9.2.   Identify a fit for purpose procedure to maintain and update user manuals/process notes, which does not require significant resource (i.e. not a dedicated resource to solely maintain and update manuals/processes).
9.3.   Standardise the sharing of information, and training of staff, so a uniformed approach is taken rather than an individual approach by an Officer.
9.4.   Analysis of which 'As Is' processes will need to be updated
9.5.   'To Be' workshops to map new processes
9.6.   Provision of detailed procedures and support documentation to help embed changes

10. IT
Do the proposed changes impact the use of IT systems (eg additional functionality/modules; stop using it etc) Yes ~~/ No / Not applicable~~
10.1.   As part of the proposed changes, the following IT systems are being implemented:
10.1.1. Planning Obligations Suite and Public Facing Module (Exacom)
10.1.2. Total Land Charges (Agile) resulting in stop using Swift
10.1.3. Land Charges Programme
10.1.4. Planning Workflow Tool (Enterprise) – Building Control already utilise Enterprise so additional services will implement it
10.1.5. CAPS Uniform (Idox)

11. Staff and contractors
Does the proposed change impact staff and contractors?   Yes / ~~No / Not applicable~~
11.1.   A Directorate change paper will be required to implement any personal changes that have come out from Stage One Service Review meetings with Service Managers.

12. Climate Change
Does the proposed change have Climate Change Implications? ~~Yes~~ / No ~~/ Not applicable~~
12.1.   It is indirect positive change implications, through process and service improvements.

Appendix 1 – Improvement Action Plan - Planning, Housing & Climate Emergency

Ref	Action	By when	Responsible Officer(s)	Progress	Status*
Existing Planning Service Action Plan					
01	Engagement with Neighbourhood Forums in pre-application processes a) Continue reinforce with officers and link to joint Agent and Neighbourhood Forum Session b) Develop joint protocol for working approach with the Council, Neighbourhood Forums and Agents	April 2023	David Edmondson (Divisional Director), Wendy Ormsby (Service Manager)	Adopted as standard approach, good early engagement happening. Although this now a challenge with the enforced dormancy of the Paignton Neighbourhood Forum.	A
02	Strengthen relationship with TDA and Planning for delivery and management of Council projects, including: a) establish clear expectations required of project leads eg. PPA and how DRP will be conducted b) hold monthly meetings with TDA		Anne-Marie Bond (Chief Executive), Kevin Mowat (Director) David Edmondson (Divisional Director), Wendy Ormsby (Service Manager)	Regular meetings between TDA, Head of Service & Divisional Director in place. New dedicated officer in place working on all TD led schemes.	G
03	Review Site Visits as opportunity to develop member/officer relations: a) Officer sites visits required for applications unless very clear/straight forward application with no objections		Wendy Ormsby (Service Manager)	Officer site visits back to normal, committee site visits as and when necessary. Requests from members considered along with chair of planning.	G
04	Review criteria and approach to Site Review Meetings to enable established criteria and trigger points for virtual meetings and where no resolution ability to escalate to physical visit or refer to Planning Committee		David Edmondson (Divisional Director), Wendy Ormsby (Service Manager)	Site Review Meetings procedure updated, virtual meetings followed by actual meetings if required.	G
05	Member Training Programme - Including Chair's training programme		David Edmondson (Divisional Director),	Modular training Sessions put on for members this year,	A

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Ref	Action	By when	Responsible Officer(s)	Progress	Status*
	a) Evaluate Planning Committee training following receipt PAS feedback report a) Consider Planning Committee induction programme and ongoing annual training programme including specific training for Chairman of Planning Committee b) Revisit Member Job Descriptions in the Constitution to build in skills and expectations		Wendy Ormsby (Service Manager)	including some presented with partners. Now working with Governance Support for the next administration - modular programme and induction courses.	
06	To resource PPAs, identify HR Strategy for recruitment, backfill and ensuring sufficient resources to deliver PPAs quickly [R8]		David Edmondson (Divisional Director), Wendy Ormsby (Service Manager)	Great increase in Planning Performance Agreements (PPA's) bringing in additional funds and allowing for	G
07	Review strategy for specialist posts and purchase of services with sharing resources across neighbouring authorities to build resilience [R12]	April 2023	David Edmondson (Divisional Director), Wendy Ormsby (Service Manager)	Agreement reached with DCC over Ecological & Archaeological support.	A
08	Improved Planning Officer e-mail & telephone communication Next steps/additional actions: a) PAS to deliver training on customer standards b) Establish standards/criteria for response times and consider more use of phone calls/Teams meetings instead of emails c) Introduce standard auto out of office response to manage expectations		Wendy Ormsby (Service Manager)	a) PAS Training Completed b) Microsoft Teams meetings being used instead of calls, where applicable. c) Officers using better e-mail messaging. Still important to focus on this important area and covered under Customer Service activities.	G
09	Staff development programme a) Introduce new training and development package for team to enable them to deliver an excellent service (including potential of setting up Planning Academy - similar to our Social Worker approach working with Plymouth University), to ensure staff feel valued	April 2023	David Edmondson (Divisional Director)	Further work needed on this, although do have team member started on Degree Apprenticeship Planning course at University of Plymouth and good attendance from the teams at CPD events.	A

Ref	Action	By when	Responsible Officer(s)	Progress	Status*
10	Undertake options appraisal for meeting conservation statutory functions, including training and development for wider team on conservation/heritage matters as well as dedicated officer	April 2023	Kevin Mowat (Director) David Edmondson (Divisional Director), Wendy Ormsby (Service Manager)	Agreement for a new Heritage Officer from Place Director, to work closely with Culture colleagues and include implementing the Heritage Strategy. Role has been JE'd and will be Grade K. Now included as part of new structures part of the Service for the Future project	A
Planning Applications					
11	Activity analysis of planning web offering. Website traffic baseline statistics to inform what is working and what may not be.	30/11/2022	Alex Pozniak (Business Analyst)		A
12	Activity analysis of general enquiries into the service. Recording the types of calls and emails received to provide a baseline.	30/11/2022	Alex Pozniak (Business Analyst), Tim Herring (Senior Business Analyst)		A
13	Workshops to dive deeper into the baseline statistics gathered to support positive changes to how planning applications are received and processed. Include review the current Local Validation List and to improve its access for non Planning specialists. Review the Council website to ensure that older versions of the Local Validation List are removed from view. [R1, R2, R4, R5]	30/11/2022	Tim Herring (Senior Business Analyst)		
14	Workshop to dive deeper in how we manage the function of Planning Online comments, options of moving the function to customer services or not allowing the public to comment online and all comments would be handled internally by Planning Officers dealing with the applications	30/11/2022	Alex Pozniak (Business Analyst), Tim Herring (Senior Business Analyst)		

Ref	Action	By when	Responsible Officer(s)	Progress	Status*
15	Implement Workshop Outputs	31/03/2023	Service Managers		
16	Resolve current issue with G-forms in relation to potential limit on file sizes, which are submitted (there is an issue with no documents received which may be due to a limit on the system).	14/03/2023	Alex Pozniak (Business Analyst)		A
Complaints					
17	Fully map the process of managing complaints	27/01/2023	Tim Herring (Senior Business Analyst)		A
18	To Be workshop to dive deeper into the issues and provide solutions to ensure we provide a consistent approach to complaints	30/11/2022	Tim Herring (Senior Business Analyst)		
Customer Service					
18	Reset the focus on customer service and the standards set [R14]	03/02/2023	Tieneka Akers (Internal Engagement Officer)		A
19	Additional customer service training [R14]	10/02/2023	Tieneka Akers (Internal Engagement Officer)		
Resourcing (Change Paper)					
20	Change Paper	17/04/2023	Matthew Fairclough-Kay (Divisional Director), David Edmondson (Divisional Director)		
21	Review of roles and responsibilities (i.e. Job Descriptions) so they are updated where necessary, including correctly reflecting line management responsibility and reducing duplication of activities between Planning Support & Development Management [R6, R7, R9, R13]	17/04/2023	Service Managers, Cilla Wilson (HR Manager)		

Ref	Action	By when	Responsible Officer(s)	Progress	Status*
22	Conclude process of making Technical Service Support posts, career posts. Process was paused while project was established.	17/04/2023	Mark Irving (Service Manager), Cilla Wilson (HR Manager)		
23	Analysis of options & costs associated with bringing a heritage/landscape specialist in-house. Explore non FTE specialist posts (e.g. Ecology, Archaeology and Urban Designer) with Devon County Council as part of a service level agreement [R11, R13].	17/04/2023	Wendy Ormsby (Service Manager)		
24	Explore alternative transport options, for staff, to reduce mileage claim submissions.	17/04/2023	Stuart Loly (Project Manager)		
25	Identify non-statutory services (as unable to meet current demand) and determine if they should continue. Alternative sources of administrating could be set up e.g. e-form, self-serve.	17/04/2023	Service Managers		
26	Review TDA Service Level Agreement (SLA) exploring needs around refreshing SLAs.	17/04/2023	Stuart Loly (Project Manager)		
Reporting					
27	Workshop to understand the informational needs of the service that would enhance upon the existing KPI set	31/03/2023	Alex Pozniak (Business Analyst), Tim Herring (Senior Business Analyst)		
28	Analysis of how an automated dashboard can be created to support the service and wider council	13/02/2023	Alex Pozniak (Business Analyst), Tim Herring (Senior Business Analyst)		
29	Set up regular Key Performance Indicator (KPI) review meetings as part of business as usual activities	31/03/2023	David Edmondson (Divisional Director)		
IT Systems					

Ref	Action	By when	Responsible Officer(s)	Progress	Status*
30	Continue implementation of Planning Obligations Suite and Public Facing Module (PFM) - designed for planning and community infrastructure levy (CIL)	13/03/2023	Mark Irving (Service Manager), Max Sage (Project Leader), Stuart Loly (Project Manager)		A
31	Continue replacement of Swift system, for land charges	21/03/2025	Mark Irving (Service Manager), Max Sage (Project Leader), Stuart Loly (Project Manager)		A
32	Complete migration to HM Land Registry Local Land Charges Programme (LLCP) – single, digital LLC register for England and Wales.		Mark Irving (Service Manager), Max Sage (Project Leader), Stuart Loly (Project Manager)		A
33	Implement Enterprise Case Management workflow tool within Development Management and Planning Support [R3]	30/01/2023	Wendy Ormsby (Service Manager), Mark Irving (Service Manager), Max Sage (Project Leader), Stuart Loly (Project Manager)		
34	Resolve current system issues with CAPS Uniform (Idox) by committing Service resources to assist/review/test the work delivered by Idox	28/02/2023	Alex Pozniak (Business Analyst), Tim Herring (Senior Business Analyst), Max Sage (Project Leader)		
35	Explore a solution of map interrogation – MapInfo Pro (Precisely) being provided by one site to the current situation of gaining information from at least four places (e.g. Address Café; Find My Nearest; MapInfo; UNI-form)	20/01/2023	Max Sage (Project Leader)		
36	Explore improving publication of Local Plan and mapping information, so it is better aligned to neighbouring authorities' approach (e.g. ARC GIS)	03/02/2023	Max Sage (Project Leader)		

Ref	Action	By when	Responsible Officer(s)	Progress	Status*
37	Explore integration opportunities between CAPS Uniform & W3 to reduce duplication of work	17/02/2023	Alex Pozniak (Business Analyst), Tim Herring (Senior Business Analyst)		
38	System capability of W3 (Civica), how does it differ from W2, is there additional functionality that can improve current usage	03/03/2023	Alex Pozniak (Business Analyst), Tim Herring (Senior Business Analyst)		

Status Key: R = Behind schedule; A = In progress; G = Complete

Appendix 2 - As Is Review | Planning, Housing & Climate Emergency

September 2022
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Purpose and Objectives of the 'Council Redesign' programme

Torbay Council, like other councils, continues to face the ongoing challenge of austerity and is rapidly realising that the opportunities for making savings are diminishing. In parallel to this, the Council is currently embarking on its 'recovery programme' in response to the COVID-19 pandemic by rebuilding, restoring and rehabilitating the community following this emergency.

Within the context of the Councils needs to consider bigger and bolder transformation opportunities that build a sustainable operating model for the 21st century, post COVID-19 whilst also delivering a range of financial and non-financial benefits.
As such this transformation plan sets out how we will bring a coherent, joined-up approach to change, that meets the council's priorities as set out our Community and Corporate Plan, and will support the delivery of financial targets in the Medium-Term Resource Plan.

At the heart of our transformation must be a renewed focus on our priorities, our customers and our communities, with a determination to put people and outcomes ahead of organisational boundaries and bureaucracy.
At the same time, the recovery from the COVID-19 pandemic provides us with the opportunity for the council to radically rethink services and improve outcomes. We need to respond urgently and safely by transforming our services, our focus and our working practices.

Ultimately, our objective is:

> To simplify and standardise how we work so we can support the communities of Torbay and build a council fit for the future

To achieve this, we will focus on a number of design principles that will be used when re-designing our services - these are set out in section 7. They provide a focus for innovation and change, and will be used as the basis for our transformation.
To facilitate delivery, the 'Council Redesign Programme' will be broken down into three projects with the overarching objectives:

> 'Our Organisation' – We will put our customers at the centre of our organisation

> 'Our Communities' – We will reconnect with and enable and empower our communities

> 'Our People' – We will be an organisation that our people are proud of

Our Organisation Project

As part of the 'Our Organisation' project, Torbay will undergo a mapping exercise with each service area. This will involve:

- Collaboratively mapping the 'As Is' processes
- Production of an 'As Is' review document
- Collaboratively mapping the 'To Be' processes

The 'As Is' review document will detail any issues identified and potential opportunities to improve efficiencies for the service area. This will then be agreed by the service area, Subject Matter Experts (SMEs), Management and Director. Once the review has been conducted the processes that have been agreed to be transformed will then be analysed in more detail and the 'To Be' processes will be mapped for the service, once the timeline for this is known it will be shared with the service.

The Business Improvement & Change Team have mapped 74 processes for the Service. The outcome of which has identified numerous issues and potential opportunities to improve customer satisfaction, back office efficiencies, income generation and potential cost savings (Appendix A details the processes mapped). All IT systems that are currently being utilised are also further detailed in Appendix B.

Issues Identified

Customer Experience

1. Resourcing
   a. The service is currently operating at or beyond maximum capacity, in some cases detrimentally affecting productivity, efficiency and customer service
   b. It has been highlighted that the workload will increase in the coming years. Climate priorities will affect the workload of the service
   c. A need for more higher-level officers for consulting on complex decisions and sign off authority and administrators to support
   d. HR processes for Managers are a drain on time and resource
   e. This under resourcing is having a negative impact on customer service, income generation and overall service performance
   f. Numerous points of failure when staff are off sick or on annual leave
   g. There is a lack of in-house specialists on matters such as heritage and landscape impact
   h. With the migration to HM Land Registry there will be further demand on resources to support the digitisation, system replacement and migration

2. Information Governance (Complaints Team)
   a. Information Governance – Customers currently complaining through the complaints route and not directly with planning causing additional workload, need to identify the optimal route to manage these complaints
   b. Identified as giving customers wrong information or directing customers to the wrong service/department
   c. Identified by having additional steps in referrals, rather than instructing customers to contact planning directly
   d. Increase in contact points, work times, risks of misinformation and making the complaints worse
   e. Member enquiries are directed through iCasework, in many cases it may be more efficient for these to go straight to an Officer and/or a Manager

3. Standardising ways of working
   a. As there are multiple systems being used across planning, there is a requirement to standardise how we use these systems, best practices, and ways of working
   b. This non-standardisation is leading to errors, duplication of work and increased demand for communication/questions between each area of the service
   c. Expressed the need to do more collaborative work with other members of the service, to ensure everyone understands each other's workloads and knock-on effects of tasks/decisions
   d. There are inconsistencies in decision making

4. Planning Online – application commenting website
   a. The workload around the uploading of planning application files has increased due to customers submitting more files than they traditionally have, not only are there more files but each file needs to be manually renamed for better indexing
   b. Managing comments takes up too much time. There are many comments which are not displayed due to the nature of them (safeguarding or vexatious issues). A lot of time is spent vetting these comments with no clear beneficial outcome to the service/process

5. Customer Service Enquiries
   a. There are a large number of customer requests for planning advice (Not seeking paid advice), general enquiries
   b. Currently the service does not have resource to respond to each of these effectively
   c. An increased volume of documents(drawings) being received per application, previously when customers submitted physical copies, they would submit 2 A1 documents (1 of existing plan & 1 proposed plan)
   d. Currently through the planning portal there is no limit of supporting documents/drawings that a customer can submit. As all documents need to be checked this leads to extended work times per application
   e. The time to validate these documents is extended

f. Both missing documents and standard of documents submitted are often not meeting the standard on the first submission

6. Refunds

a. Planning application fees are being 'refunded' back to the customer
b. 2020 - £18k refunded, 2021 - £30k refunded, 2022 – to date £11k refunded
c. Reasons range from 'not been processed within the allocated time period', 'good will' gestures where there is an error or delay, or the application never became 'valid'. Where refunds are of concern is cases where the service could have done something differently or better to avoid the need for a refund

IT Systems

7. MapInfo (Precisely)

a. A need for a mapping system review to ensure its fit for purpose
b. MapInfo cannot be accessed at home, or functionality is minimal

8. Uniform (Idox)

a. System usage review is needed
b. Limited number of SMEs that can edit/create new templates
c. Numerous templates in the system that are not being utilised
d. Defunct drop-down items within the system
e. Inconsistent training/ways of working

9. W2 / W360 (Civica)

a. W2/W360 is currently not being fully utilised across planning
b. It has been identified that "the functionality is there; it's just not used"
c. It has also been identified that a local authority (Teignbridge) currently uses W2/W360 more effectively
d. W2/W360 does not integrate with Uniform. There is duplication of work where similar functions exist

10. Planning Obligations Suite (Exacom)

a. Implementing Exacom's 'Planning Obligations Suite'
b. Project to implement is active
c. Resourcing this and managing BAU is an issue

11. Total Land Charges (Idox)

a. New TLC system is yet to be implemented
b. The team also don't have 100% understanding of the functionality potential
c. Currently processing and maintaining physical documents, record cards and maps
d. Indexing and maintaining these physical records are seen as a beneficial point
e. Noted that there have been previous(unsuccessful) attempts to digitise
f. New national land registry may take some need of this away
g. The new TLC system may also digitise this information

12. Swift (Agile)

a. Agile's support for the Swift system is poor and has been for a number of years which has impacted on BAU and inhibited service innovation. Integration with other systems is also poor and they have not engaged with HMLRC on tools for data migration or provided APIs
b. Swift system errors
c. See "Swift Errors" document, As this lists majority of the Issues (Appendix C)

13. Reporting

a. Reports are limited
b. Reporting is a manual time-consuming process
c. Reports are only focused on KPI's

Opportunities

Customer Experience

1. Planning Applications

a. Analyse site traffic to get a baseline for site traffic landing on the council information page and then exiting via planning portal link

b. Have a review of the current information page(s) that support planning applications, has this been optimised for customers to find the information easily

c. Investigate whether adding more specific links to direct our customers to specific areas of information on the planning portal (FAQs with direct links to planning portal pages) would decrease general enquiries and what the administration of this would involve

d. Track types of query email/calls that we are receiving because customers cannot find the information on the planning portal?

e. Review and implement new optimised planning web page with new signposting

f. Analyse the new information page to gather comparison information against baseline

g. Investigate the benefits of a FAQ page

h. Investigate whether Chatbot functionality could work in this context

i. Investigate whether sharing the management of the Planning Online comments with customer services would work, releasing support staff to do the work they should be doing

j. Investigate whether there are any benefits to sharing the uploading of validated planning applications to a customer service function

k. The number of documents/drawings submitted with planning applications has increased which has a knock-on effect when uploading to the application commenting portal. There is a need to analyse how these submissions can be streamlined or charged when they exceed provided guidance

l. Review work currently being piloted by DLUHC on introducing a standardised platform for planning enquiries and application submissions

2. Complaints

a. There are multiple routes for a customer to complain about planning applications. There is a need to streamline this route to ensure these complaints are dealt with efficiently without multiple hand-offs between teams. Option to digitalise the initial complaint contact and then managed internally with defined processes and timescales

3. Resourcing

a. Roles and responsibilities review required to ensure that the service is fully resourced to manage the workloads and maximise the ability to generate income, at present, applications are going overtime so refunds are being given

b. Standardise the sharing of information across the service, and the training of staff so a uniformed approach is taken rather than an individual approach by an officer

c. Investigate options and costs of having in-house heritage and landscape specialist(s) within the service instead of contracting them in when required

IT Systems

4. MapInfo Pro (Precisely)

a. Analyse and provide solutions for staff to be able to use this software when working remotely

b. System review of functionality and training needs, linking in with other service areas that may use this mapping solution to ensure that it is still fit for purpose

c. Investigate how MapInfo can work more seamlessly with other systems used within the service and avoid duplication

d. Investigate other Local Authorities approach to mapping systems, are there better offerings out there e.g. ARC GIS has a better user interface and broader functionality than MapInfo

5. Uniform & Enterprise (Idox)

Uniform system review

a. Identify the document templates the teams use regularly
b. Review the currency of the templates and update, archive and/or create new templates
c. Review all drop-down lists in the system, update, archive and/or create new items
d. Identify how to manage data quality in the system i.e., through reporting, alerts within the system or forcing users via the use of mandatory fields
e. Identify any training needs to enable the local management of the system
f. Uniform and W360 are not integrated which leads to duplicated workloads. Are there options to limit this in anyway?

Enterprise module

a. Support and accelerate the implementation project for the Enterprise module
b. Implementation will give the service a workflow management tool similar to W2/W360's workflow processes but more integrated with the Uniform database which manages the textual and spatial data relating to planning applications, appeals, enforcement cases and building control cases

6. W2/W360 & W3 & iCasework (Civica)

System capability review

a. Link up with other LAs using this system to identify any opportunities to enable more efficient use in Torbay
b. W3 upgrade opportunities for training and overhaul of how the service use the system (dependent on whether the upgrade is implemented)
c. Identify where there are opportunities to support the planning service with the implementation of iCasework

7. Planning Obligation Suite (Exacom)

a. Support and accelerate the project to implement this system with additional resource to manage BAU and the project. Implementing the Planning Obligation Suite and the Public Facing Module will allow customers to self-serve in relation to certain CIL and Section 106 queries
b. Maximise the training opportunities for the system

8. Total Land Charges (Idox)

a. Total Land Charges system will offer better integration with other Idox products (the planning and building control databases, public access and the planning obligation suite), better support ad Idox are actively engaged I working with HMLRC
b. There has not been a clear timeline for when this system will be implemented
c. It is assumed that TLC will replace Swift and some ability to digitise some or all the physical documents

9. Swift (Agile)

a. System review and update of the swift software if TLC is not being implemented in the near future as there are current issues with swift

10. Reporting

a. Reports need to be extended to provide better intelligence on demand and effectiveness of the planning service
b. An automated suite of reports/dashboard utilising Power BI would be a more efficient method for the service
c. A need to report on the total figure of refunds lost to the customer and the reasons for them

Appendix A – Planning Processes Mapped

An 'As Is' mapping exercise of the planning service has now been completed and the following 'As Is' process maps have been produced and validated.

Process	Service Area	SMEs
Registering Planning Applications	Planning Support	Justin Carpenter
Registering Pre-Applications	Planning Support	Justin Carpenter
Registering/Superseding Plans	Planning Support	Justin Carpenter
Publication of Applications	Planning Support	Justin Carpenter
Logging Consultee Responses	Planning Support	Justin Carpenter
Logging and Redacting Representations	Planning Support	Justin Carpenter
Re-consultation	Planning Support	Justin Carpenter
Issuing Decision Notices	Planning Support	Helen Wills
Triaging and Registering Enforcement Cases	Planning Support	Helen Wills
Gathering Appeal Documents	Planning Support	Helen Wills
Creating Appeal Cases	Planning Support	Helen Wills
triaging and Registering Enforcement Cases	Planning Support	Helen Wills
Arrange Public Inquiries & Hearings	Planning Support	Helen Wills
Processing Appeal Decision	Planning Support	Helen Wills
Checking Permitted Development Rights	Planning Support	Helen Wills
Providing Copies of Documents to Solicitors	Planning Support	Helen Wills
Raising Orders and Invoices	Planning Support	Mary Brookfield
Goods receipting and payment	Planning Support	Mary Brookfield
Invoices Raised	Planning Support	Mary Brookfield
Credit Notes	Planning Support	Mary Brookfield
Payment Vouchers	Planning Support	Mary Brookfield
Planning Fee Refunds	Planning Support	Mary Brookfield
Accruals and year end	Planning Support	Mary Brookfield
Calculating CIL liability	CIL / Section 106	Nicky McGowan
Processing CIL Exemption Requests	CIL / Section 106	Nicky McGowan
Generating Liability Notices	CIL / Section 106	Nicky McGowan
Generating Demand Notices	CIL / Section 106	Nicky McGowan
Recording Payment of CIL/Section 106	CIL / Section 106	Nicky McGowan
Confirming financial obligations met	CIL / Section 106	Nicky McGowan
Respond To EIR requests	CIL / Section 106	Nicky McGowan
Supply Documents with 106 Enquiries PDF docs	CIL / Section 106	Nicky McGowan
Answering Land Search CIL/106 questions	CIL / Section 106	Nicky McGowan
Logging Land Searches	Land Charges	Sarah Howard
Check Records For History	Land Charges	Sarah Howard
Edit Searches	Land Charges	Sarah Howard
Send Land Search Results	Land Charges	Sarah Howard
Register New Charges	Land Charges	Sarah Howard
Adding Charges to IT systems	Land Charges	Sarah Howard
Removing Charges from IT systems	Land Charges	Sarah Howard
Update records with new and amended addresses from Highways	Land Charges	Sarah Howard
Update records from Planning Weekly and Decision Lists	Land Charges	Sarah Howard
Respond To EIR requests	Land Charges	Sarah Howard
New Developments	Land Charges	Sarah Howard

Process	Service Area	SMEs
Check History on a site and update records	Land Charges	Sarah Howard
Validation of pre-apps and applications	Planning Development	Katie Greer / Scott Jones
Allocation of pre-apps and applications	Planning Development	Wendy Ormsby
identifying neighbours and consultees to be consulted	Planning Development	Katie Greer / Scott Jones
Putting up site notices	Planning Development	Katie Greer
Assessing and writing up planning applications and pre-apps	Planning Development	Katie Greer / Scott Jones
Signing off officer reports/recommendations	Planning Development	Scott Jones or Wendy Ormsby
Site Review Meetings	Planning Development	Wendy Ormsby
Discharge of condition applications	Planning Development	Katie Greer / Scott Jones
Completing appeal questionnaire	Planning Development	Katie Greer
Preparing appeal statements	Planning Development	Wendy Ormsby
Preparing appeal cost rebuttals	Planning Development	Wendy Ormsby
Attending Appeal Hearings or Inquiries	Planning Development	Wendy Ormsby
Preparing committee presentations	Planning Development	Leah Raybould
Presenting at Planning Committee	Planning Development	Scott Jones or Wendy Ormsby
Attending Chair's briefing	Planning Development	Wendy Ormsby
Replying to general enquiries	Planning Development	Wendy Ormsby / Katie Greer
responding to member Enquiries	Planning Development	Wendy Ormsby
Responding to Formal Complaints	Planning Development	Wendy Ormsby
Responding to FOIs	Planning Development	Wendy Ormsby
Investigating Planning Enforcement complaints	Planning Development	Carlo Josi
Closing planning enforcement cases	Planning Development	Carlo Josi
preparing and serving Planning Enforcement Notices	Planning Development	Carlo Josi / Ailsa Delaney
Monitoring planning enforcement compliance	Planning Development	Carlo Josi
Design Commission & Monitoring	Strategic Planning	Adam Luscombe
Highways Consultation feedback	Strategic Planning	Tracy Brooks
Housing Monitoring	Strategic Planning	Zdzislawa Kunaszkiewicz
Local Plan (DPD)	Strategic Planning	David Pickhaver
Neighbourhood Plan	Strategic Planning	David Pickhaver/Tracy Brooks
Site Identification & Assessment	Strategic Planning	Ashwag Shimin
Supplementary Plan Document	Strategic Planning	David Pickhaver

Appendix B – Planning IT Systems

System/Vendor	Description	Senior Users
MapInfo Pro/Precisely	A complete, desktop mapping solution for the geographic information system (GIS) analyst to visualize, analyse, edit, interpret, and output data — revealing relationships, patterns, and trends.	Sean Schofield
MapInfo Pro Viewer/Precisely	A view only version of the above software	Sean Schofield
Planning Obligations Suite/Exacom	The powerful web-based back-office Planning Obligations Suite is made up of three modules: The S106 and CIL governance modules, and the Project Module. These modules are designed for planning and CIL charging authorities to monitor, enforce and deliver community infrastructure. The CIL & S106 modules can be purchased separately, however the Project Module has to be purchased in all cases.	Sean Smith
Swift/Agile Land Charges/Agile	Land searches need to be dealt with quickly and efficiently by Land Charges and Planning departments; we understand this, so our local land charges software delivers a reduced turnaround time and reduces the likelihood of errors – allowing you to provide an improved service to citizens whilst also potentially saving on costs and resources for your department.	Sarah Howard
GeoServer	GeoServer is an open-source server for sharing geospatial data. Designed for interoperability, it publishes data from any major spatial data source using open standards.	Sean Schofield
iManage/Aligned Assets	iManage is our functionally rich local authority gazetteer and forms the core of our solutions for creating and maintaining the streets, property and land that form the Local Land and Property Gazetteer (LLPG) and Local Streets Gazetteer (LSG). It also allows for the sharing of streets and properties with GeoPlace, as well as other systems and people within the council. British Standard BS7666 iManage enables the creation and maintenance of every aspect of a property, land and street as defined by the British Standard BS7666, complete with Unique Property Reference Number (UPRN), Unique Street Reference Number (USRN) and the geographic coordinates. It also provides the capability of searching on	Sean Schofield

System/Vendor	Description	Senior Users
	every element the above. In addition, it has multiple advanced features to improve the productivity of a local authority custodian using it,	
Uniform/Idox	Our popular Uniform case management software has been fundamental to local authority case management for over three decades. Designed, developed and supported by ex-government staff, it's our robust single solution for efficient digital government, available fully hosted in the cloud, or on-premises.	Mark Irving/Justin Carpenter
Enterprise Module/Idox	Idox Enterprise is a licensable Uniform module available individually for the relevant solutions of Uniform. It can provide "at a glance" graphical progress information to a local authority on whether they are achieving their targets and to provide facilities (such as prioritised task lists and the ability to monitor teams' task lists, plus reallocate tasks when necessary) aimed at improving staff efficiency to help achieve those targets.	Mark Irving/Justin Carpenter/Sean Smith
Public Access/Idox	The IDOX Public Access for Planning and Building Control website has been designed to provide an efficient and easy-to-use process for members of the public to search for and track applications for planning permission, appeals against refused consent and building regulations applications.	Mark Irving/Justin Carpenter/Sean Smith
CAPS Uniform/Idox	IDOX CAPS Uniform for Planning and Building Control has been designed to provide an efficient and easy-to-use process for members of staff to manage applications for planning permission, appeals against refused consent and building regulations applications.	Mark Irving/Justin Carpenter/Sean Smith

Other relevant organisations
Ordnance Survey
> Now providing a number of APIs for additional spatial data etc.

GeoPlace
> Owned by the LGA (Local Government Association). Also have a partnership with Ordnance Survey. Requirement to adhere to national standards (checked monthly) in order to receive grant and products from Ordnance Survey under the Public Sector Geospatial Agreement.

Other Considerations
> Issues around Address updates
> Duplicate LPI Keys - CAPS Uniform
> Snapshot of LIVE environment into TEST Uniform
> Issues with speed of Mapinfo, Uniform and other mapping software due (to some extent) in moving to homeworking/VPN connection and the amount of data being moved around

UNI-form Map Loader Maintenance	Map Loader is a separate 'tool' used to load map data into Uniform
Spatially Enabled x40	No. of Licences to use 'spatial' elements of Uniform
UNI-form Capital x40	No. of Licences to use Uniform
1APP Planning Portal Connector	Provides /connectivity' to Planning portal and enables applications submitted via Planning Portal to be downloaded.

IDOX PA for DC	The Idox Public Access For Planning website has been designed to provide an efficient and easy-to-use process for members of the public to search for and track applications for planning permission, appeals against refused consent and planning enforcements
IDOX PA for BC Maintenance	The Idox Public Access For Building Control website has been designed to provide an efficient and easy-to-use process for members of the public to search for and track for building control applications and contraventions
(Building Inspections App Maintenance) Building Control App (iOS)	An onsite App that is used by Inspectors to complete inspections whilst 'in the field'. Data is downloaded from Uniform direct to an App installed on a mobile device, typically a tablet. The inspector can then work 'off-line', complete and record the outcome of the inspection and the details are then uploaded to Uniform with no need for data to be re-keyed.
Enterprise for Building Control	Idox Enterprise is a licensable Uniform module available individually for the relevant solutions of Uniform. It can provide "at a glance" graphical progress information to a local authority on whether they are achieving their targets and to provide facilities (such as prioritised task lists and the ability to monitor teams' task lists, plus reallocate tasks when necessary) aimed at improving staff efficiency to help achieve those targets.
Enterprise for Development Control	Idox Enterprise is a licensable Uniform module available individually for the relevant solutions of Uniform. It can provide "at a glance" graphical progress information to a local authority on whether they are achieving their targets and to provide facilities (such as prioritised task lists and the ability to monitor teams' task lists, plus reallocate tasks when necessary) aimed at improving staff efficiency to help achieve those targets.
Idox Uniform 10.6.1 Upgrade Services	Idox services required to complete the Uniform 10.6.1 upgrade

Appendix C – Swift Errors

There are currently several features within the Swift software which have lost functionality or ceased to function. Causing the planning team to use manual work arounds. This is resulting is extended work times.

Sending searches

Currently shows error messages. Swift should be able to automatically send searches out to customers once approved by the land charges team. Instead receive security error messages, leading to sending searches manually. Occasionally when searches are sent to customers via the auto swift/outlook. The customer receives the PDFs as blank, with just the council headers & footers.

Swift map functionality

When searching in the map function, previous session of looking of the map kept. This means every time the map is opened, a random destination is shown rather than the previously viewed location. This leads to added worktime as the previous location must be found before work can continue.

Processing searches in swift

- Cannot currently process/input searches into Swift – The team is currently forced to request searches to be processed by Nick in IT
- Nick seems to then force through the processes through swift using admin access
- Team cannot function without this task being complete by Nick

NLIS portal

Currently response link within the NLIS Portal is broken, which normal functions to automatically return searches back to customers. Currently the land charges team must email the PDF direct to customer. This not only leads to increased work time, but also for the customer who sees the searches in email rather than seeing an update on there end of the NLIS portal (The system they are expecting a response from)

Notes

The software company is called Swift (or was called Swift) and is now called Agile Nick Emmins in IT and Rob Williams have had dealings.

Appendix D – Planning Structure Chart
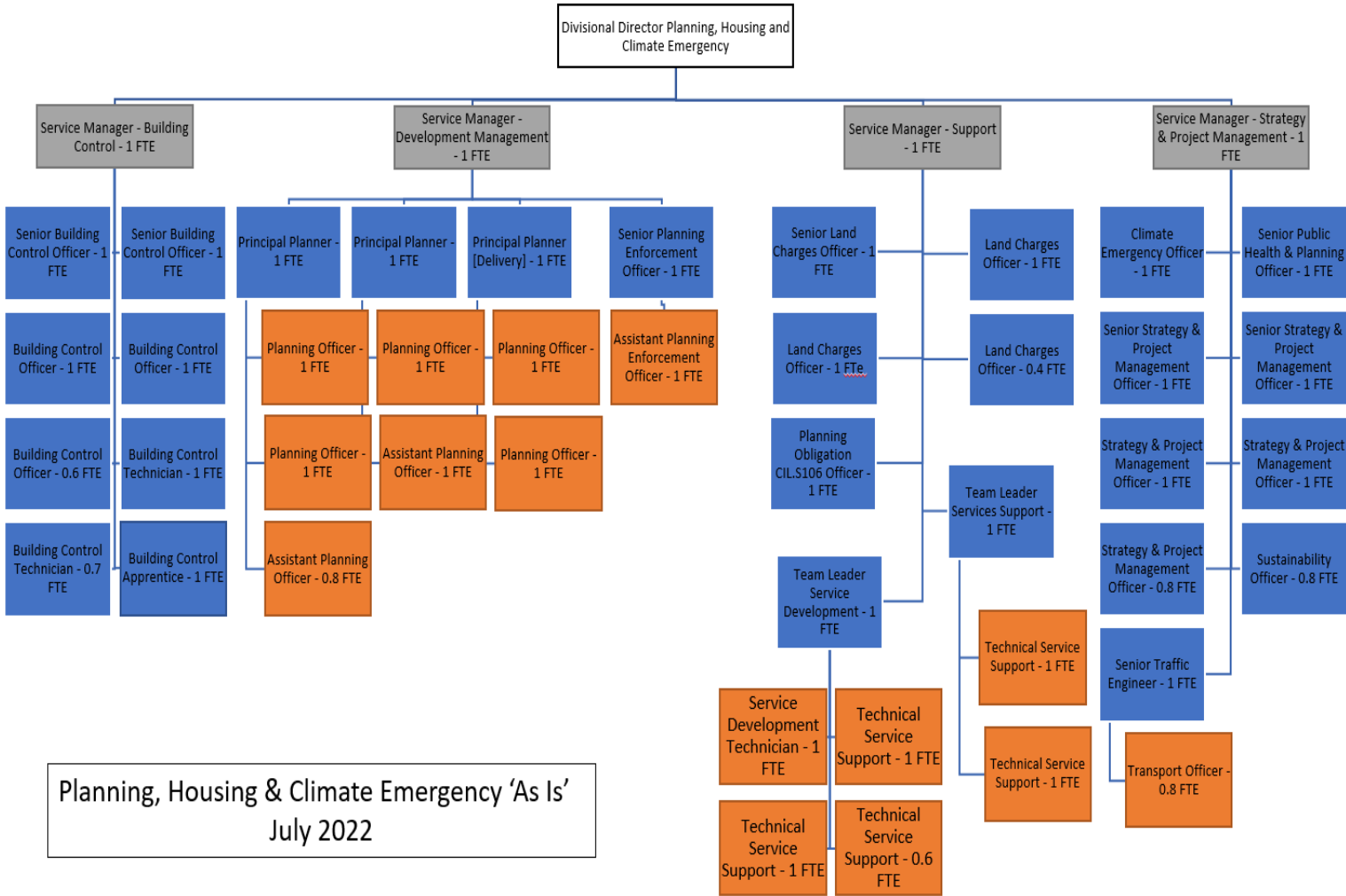
Planning, Housing & Climate Emergency 'As Is' July 2022

Divisional Director Planning, Housing and Climate Emergency

Service Manager - Building Control - 1 FTE
- Senior Building Control Officer - 1 FTE
- Senior Building Control Officer - 1 FTE
- Building Control Officer - 1 FTE
- Building Control Officer - 1 FTE
- Building Control Officer - 0.6 FTE
- Building Control Technician - 1 FTE
- Building Control Technician - 0.7 FTE
- Building Control Apprentice - 1 FTE

Service Manager - Development Management - 1 FTE
- Principal Planner - 1 FTE
- Principal Planner - 1 FTE
- Principal Planner [Delivery] - 1 FTE
- Senior Planning Enforcement Officer - 1 FTE
- Planning Officer - 1 FTE
- Planning Officer - 1 FTE
- Planning Officer - 1 FTE
- Assistant Planning Enforcement Officer - 1 FTE
- Planning Officer - 1 FTE
- Assistant Planning Officer - 1 FTE
- Planning Officer - 1 FTE
- Assistant Planning Officer - 0.8 FTE

Service Manager - Support - 1 FTE
- Senior Land Charges Officer - 1 FTE
- Land Charges Officer - 1 FTE
- Land Charges Officer - 1 FTe
- Land Charges Officer - 0.4 FTE
- Planning Obligation CIL.S106 Officer - 1 FTE
- Team Leader Services Support - 1 FTE
- Team Leader Service Development - 1 FTE
- Technical Service Support - 1 FTE
- Service Development Technician - 1 FTE
- Technical Service Support - 1 FTE
- Technical Service Support - 1 FTE
- Technical Service Support - 1 FTE
- Technical Service Support - 0.6 FTE

Service Manager - Strategy & Project Management - 1 FTE
- Climate Emergency Officer - 1 FTE
- Senior Public Health & Planning Officer - 1 FTE
- Senior Strategy & Project Management Officer - 1 FTE
- Senior Strategy & Project Management Officer - 1 FTE
- Strategy & Project Management Officer - 1 FTE
- Strategy & Project Management Officer - 1 FTE
- Strategy & Project Management Officer - 0.8 FTE
- Sustainability Officer - 0.8 FTE
- Senior Traffic Engineer - 1 FTE
- Transport Officer - 0.8 FTE