

Architecture &
Design Scotland

Ailtearachd is Dealbhadh na h-Alba

Place Skills For Housing

Module 1: Locating For Place Quality



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A Place-Based Approach to Housing

[Watch the introduction to housing video](#)

Poor quality places aren't just bad for the people living there. Over time they can lead to significant costs for the public sector, while failing to tackle the big issues like climate change or inequalities.

We know there are many challenges for those who plan, design, and deliver our places, which include:

- tackling climate change
- achieving Net Zero Emissions by 2045
- addressing inequalities in health and wellbeing
- supporting inclusive economic growth
- supporting the needs of an ageing population
- Accommodating aspects of digital transformation, and
- Public health.

There are shrinking resources, skills gaps and new policies to consider too. The scale of the collective challenge is very clear.

So, what can be done to reduce costs and get more and better designed places? At Architecture & Design Scotland, we believe the answer lies in taking a place-based approach as set out in the Place Principle. This looks across buildings, infrastructure and services to get the best benefits for a place across its lifetime.

To succeed, everyone involved in a place needs to work together to agree shared ambitions and align efforts so that investments work harder.



What is a place based approach to housing and why take one?

So, what does a place-based approach look like when we think about housing? Every place is unique, but it would commonly involve considering the following.

- What makes a good neighbourhood?
- Working together to find the best locations.
- Collective visions and briefs embedded in local plans and housing strategies.
- Using planning, design and delivery phases to achieve quality outcomes.

So, why take this approach? Many places are already working in this way. It's paying off with homes and neighbourhoods that support people's wellbeing and help to tackle the bigger issues.

However, for some places, this might mean doing things differently. Change can be daunting and there will be barriers to overcome along the way.

We strongly believe the challenge is worthwhile. As well as healthier, happier individuals and more resilient communities, there are other benefits. These include greater efficiency, shared risks and rewards, and reduced long term costs.

There is strong support for this way of working. New legislation, policy and the place principle asks all sectors to take a place-based approach.

Everyone has their part to play, but there is a vital leadership role for the public sector. Strong place leadership sets the bar for quality, promotes collaboration and innovation and supports long term public interest.

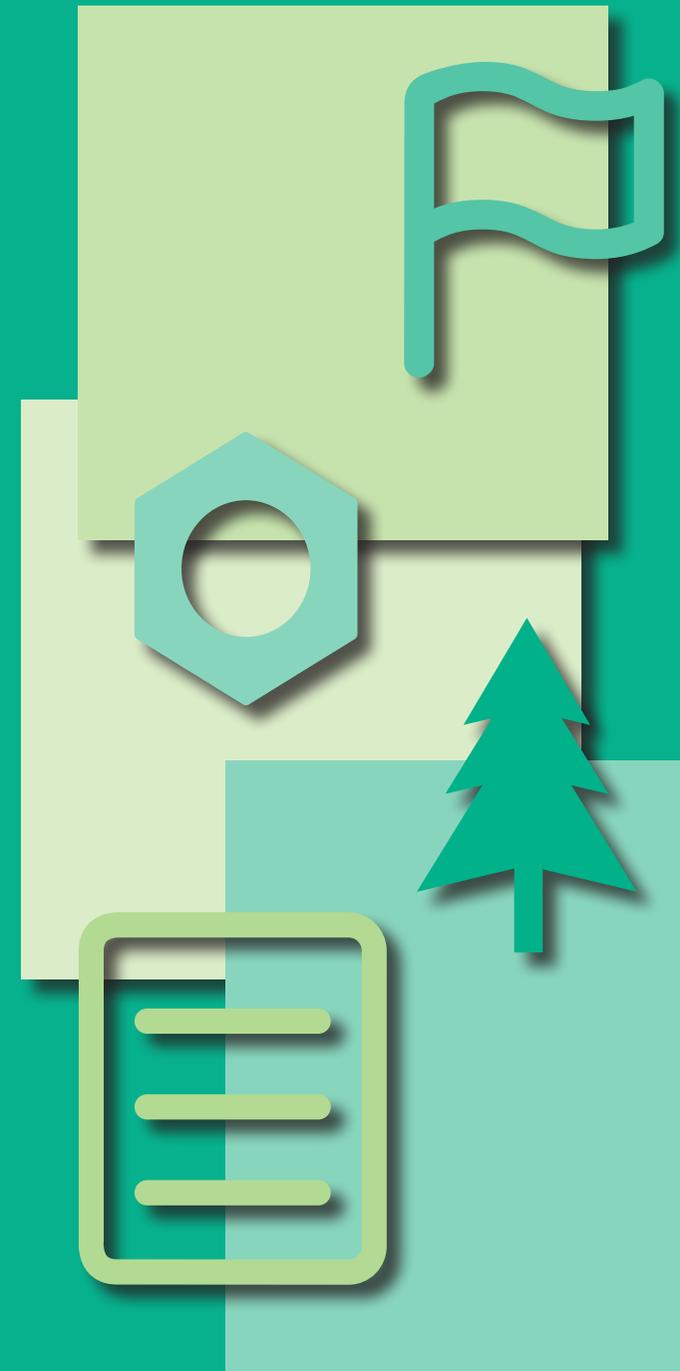
The right skills are important to making this work. We know there are many motivated professionals who want to lead the way with the right support. We can't turn everyone into designers - but we can share some of our knowledge and design approaches to help.

The Place Skills for Housing series offers three concise, easy to follow modules on Locating, Briefing and Influencing for Place Quality.

Each module includes basic placemaking principles, practical steps and a suite of resources and case studies to help apply the learning.

In practice, these steps should help you to resolve complex challenges and establish the conditions for success in your place.

All you need to do now is to give it a try...



Module 1: Locating For Place Quality

This skills module recognises the important role that Local Development Plans and Housing Investment Plans play in establishing principles about the location and form of housing-led development which impact on place quality.

The focus of the Place Skills for Housing series is on supporting better place quality through considering location and place priorities for new housing-led developments, as one important element of whole place planning.

The methods and approaches enclosed have been informed by A&DS' work supporting partners across Scotland to take place-based approaches. The material will complement broader place-based thinking over wide geographies through, for example, Strategic or Local Development Plans, Local Housing Strategies, Strategic Housing Investment Plans or Area Development Frameworks.

The materials are intended to support early stage thinking and could inform evidence gathering or Strategic Environmental Assessment stage of your new Development Plan, or early stage thinking about Local Housing Strategies or Strategic Housing Investment Plans.

While the focus of the module is housing-led development, the methods and approaches promote 'whole place' thinking and are applicable to broader areas of place-based working.

By following the snapshot steps and completing the associated templates for your own place, you will understand how to apply a place-based approach to housing as part of your development plan or housing strategy process.

Accompanying the steps are a series of practical resources to help you establish the conditions for success in your place, covering 'how to':

- secure place leadership;
- work collaboratively to develop a shared vision and explore spatial scenarios;
- identify priority areas and embed strategic briefs for key places in policy.





HOW TO
Establish
Place
Leadership



How to... Establish Place Leadership



Snapshot 1 Overview

Scenario

In this snapshot, we imagine you have been asked to brief a senior leadership figure on the approach you plan to take to considering locations for housing development as part of your Regional Spatial Strategy/Local Development Plan/Local Housing Strategy/Strategic Housing Investment Plan. The person may be a Service Manager or a Planning or Housing Convenor.

Learning Outcomes

Through skills snapshot 1, you will see how to secure leadership support for a place-based approach to identifying priority areas for housing development as part of the spatial strategy for a development plan or local housing strategy. At the end of this snapshot you will:

- Understand the foundations of a place-based approach.
- Understand the importance of securing support from senior leadership.
- Understand your own leadership role.
- Understand the steps needed to establish the conditions for successful place leadership.
- Understand how to apply this learning in practice, by following the snapshot steps and completing associated templates for your own place.

Before You Start

If you haven't already, read through or [watch the place skills for housing series overview](#) which explains what a place-based approach to housing is, what the benefits are and highlights the importance of leadership from the public sector in supporting the approach.

Why... Establish Place Leadership?



Quality places commonly have a leadership figure who establishes a place-making culture, steers development of a vision, generates input and action from others and coordinates successful delivery. This person is often a motivated individual who is supported by their organisation to take a place-based approach: a place leader.

While every sector has its part to play in making successful places, there is great scope for the public sector to provide a leadership role. Strong place leadership from the public sector can help foster collaboration and build confidence and certainty for development partners and communities. It can set the bar for place quality, promote innovation and ensure decisions and investments deliver in the long term public interest.

We know there are many motivated professionals who want to lead the way with the right support. Taking the lead on a place-based approach might mean doing some things differently to the way they've been done before in your place. You may be faced with challenges and barriers along the way. There are some conditions we know about from successful places that can help you succeed. In studies of successful places, quality was achieved by place leaders who were able to coordinate delivery and integrate the following factors:

- Control the spatial development framework.
- Achieve fast and co-ordinated regulatory approvals.
- Exercise ownership power.
- Attract funding for advance infrastructure provision.
- Secure design quality through procurement strategies.

To negotiate these factors through your own work, then support at senior level for a place-based approach is really important to enable a placemaking culture and unlock the resources and wider cooperation needed to drive successful outcomes. It is helpful to remember there is strong support for this approach at a national level and an expectation now through legislation, policy and the Place Principle for place-based approaches.

In this snapshot you will work through steps to establish place leadership to shape the vision and spatial strategy for housing led development in your place. You will see how to consider the likely team, timeframes, research and governance to support a place-based approach. You will also see how to build and communicate a case for the benefits of a place-based approach to help secure support at a senior level.

Learning Points:

You can be a place leader.

Good places need place leadership.

The public sector can provide a leadership role.

You can catalyse support from senior leadership.

There is support for a place-based approach in policy.

Resources:

The Place Principle (p59)



Step 1 | Your Team



Development plans and housing strategies establish principles about the location and form of development that impact on place quality. The new housing led developments they set out will either form new neighbourhoods, or stitch into existing ones. In either case, the quality of place isn't determined by the houses alone.

It is well recognised that other neighbourhood factors including the streets, greenspaces, access to education, employment, social opportunities, public transport, shops and other services all have an important part to play in people's experiences of the place. In selecting the right locations for new housing led development it is therefore vital to think beyond the red line boundaries of the sites themselves and consider the part the housing led development plays in a 'whole place'.

Much of the knowledge and activity you need to capture about the wider place will sit outside the scope of your planning or housing team. So, if you want to take a place-based approach, you won't be able to do this on your own, or just with your team. You will need to seek out knowledge and input from those with a role or interest in your place and plan for input and engagement with them at key points throughout the process.

We will look more closely at who to engage and how from wider communities of interest in Snapshot 2. At this early point it is helpful to consider who the broad groups are you will engage with along the way.

A common factor of successful new places is a lead organisation that has worked in a joined up way with the others involved to achieve place quality and wider place benefits. So, for a successful plan or strategy, an early priority is to establish a collaborative corporate approach.

- Start by identifying your in-house team. Sketch out the teams or departments with relevant knowledge, assets, investment programmes or activities.
- Consider what input from them could be helpful across the process.
- Consider too what likely core project team you will need. In smaller authorities this might just be you? You don't need to know exactly who each individual is at this point, just an idea of the likely roles and specialisms that can help inform your approach.

Resources are provided to help you map your project team and other audiences.

Learning Points:

Good places require collaboration.

Good places require whole-place thinking.

Consider your 'in-house' team to build early corporate alignment.

Resources:

20 Minute Neighborhood Diagram (p74)



Place-Based Local Development Plan (p82, 83)



Audience Mapping Template (p76)



Team Roles (p78)



How To Select The Right Skills (p70)



Project Team Template (p79)



Step 2 | Schedule



Developing a notional schedule at this early stage will help you understand how you can work as part of your wider development planning or strategy process. Think about the overall timeline for preparation of your Development Plan or Housing Strategy and reflect on major delivery milestones along the way. How can your approach align with or influence wider preparations?

A place-based approach to housing would commonly involve seeking input of colleague knowledge and support to consideration of:

- what makes a good neighbourhood;
- working together to find the best locations;
- collective visions and briefs embedded in local plans and housing strategies;
- and later in the process, by using planning, design and delivery phases to achieve quality outcomes.

With the place-based approach in mind, consider what input you would be looking for from colleagues and other key groups through the different phases of information gathering, visioning, development and delivery phases for your plan or strategy.

Use that information to develop a notional schedule plotting back from your desired end point. "When do you envisage key milestones for internal and external engagement with agency, development industry and community stakeholders?" "And when do you envisage key milestones for outputs including a shared vision, spatial strategy and briefs for priority areas?" An illustration is provided of the planning process along a suggested timeline.

Setting out tentative timings and outputs will enable you to communicate a robust case for support at key stages. A template is provided that can help you visually communicate key milestones.

Learning Points:

Align with wider processes.

Identify delivery milestones.

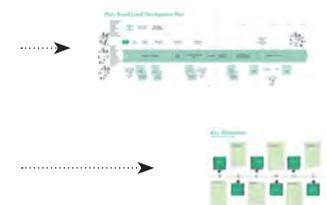
Schedule to support successful delivery.

Think early about who you will need to collaborate with and when.

Resources:

Place-Based Local Development Plan (p82 & 83)

Key Milestones (p84)



Step 3 | Research



Another important initial step is to gather baseline information to help you make the case for taking a place-based approach. Your research shouldn't be too detailed or onerous at this point. Just a headline look at why to take this approach in your place and why now. If you haven't worked in this way before, consider what has changed or what is likely to change in your place that calls for doing things differently?

We have already seen that individual professional perspectives or experiences can only tell part of the story of a place. A good way of starting to capture this intelligence is through informal discussion with colleagues from relevant in-house teams you have identified. It will help to ask open and enquiring questions to discover issues and opportunities for the places and communities in question.

Through conversations you will discover relevant information and insights. You will also start to raise awareness of the course of action you plan to take in adopting a place-based approach. You may start to identify good individual collaborators for your internal team.

Keep it simple at this stage. You will build more in-depth knowledge and data as you move through the following snapshots. We have shared some suggestions of the sort of headline information you might look for on local housing needs, delivery since last plan or strategy, and relevant strategic and local issues...

Use the information you gather to set out the rationale for taking a place-based approach in your place. Why is a place-based approach needed? What is the compelling reason for change? To support you to do this concisely, a Storytelling Template is provided. Box 1 and 2 of the template will help you structure your evidence for the Purpose and Picture elements of your pitch.

Learning Points:

Gather headline local data.

Capture insights from colleagues.

Raise awareness about the place-based approach.

Use your research to articulate a case for change.

Resources:

Strategic Data Pointers (p88)



Storytelling Template (p80, 81)



Step 4 | Governance



Good governance links to good place leadership and can help in managing place-based approaches successfully. Good governance will enable you to have clarity about accountability and decision making and have routes to escalate issues around: time; costs and resources; risks; scope; quality; and results.

We recognise that governance practices and approaches vary between authorities and between services. We suggest governance is something you consider at an early stage as part of setting strong foundations for your approach.

Consider the kind of input you are likely to need at different times and what will help you to manage issues and risks, reporting, stakeholder engagement, communications and delivery.

If taking a place-based approach means doing things in a different way in your place, think too about any particular leadership support you'll need. For example: commitment; visibility; help to unlock resources; license to innovate; support to engage others or to liaise between services for corporate alignment.

In doing this, you needn't reinvent the wheel unnecessarily. If you are working as part of your Development Plan, Local Housing Strategy or Strategic Housing Investment processes, see how you can work within existing committee and reporting structures and propose practical governance and oversight arrangements to fit.

To create successful places, consider principles of governance again with other partners once priority areas for action and collaboration are identified. If the scale or nature of those places is major or significant, tailored governance arrangements may be required. If this is a new way of working in your place it may be helpful to raise awareness of that with leadership figures at this early stage.

You can develop your own understanding of how other places have achieved this through case study examples. Case studies from Aberdeen, Loch Lomond and Trossachs and Moray demonstrate how to influence for place quality through a combination of: strong vision; strong placemaking policies; and application of design tools relevant to the local context for priority areas.

Learning Points:

Good governance will help you take an effective place-based approach.

New approaches to governance may be required for priority areas.

Resources:

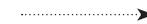
Key Milestones (p84)



Countesswells, Aberdeen City Council Case Study (p52, 53)



LIVEPark - Loch Lomond and Trossachs Case Study (p56, 57, 58)



Quality Audit Tool, Moray Council Case Study (p54, 55)



Step 5 | Make The Case For Change



To succeed, senior leadership support is vital. Put together your case for taking a place-based approach with the aim of getting a mandate and support to proceed. To do this you will need to convince your leadership figure there is a clear need for a place-based approach, provide information to explain what is involved and seek their input and commitment to support progress.

A Storytelling Template has been provided to help you structure the case for change in a way that will connect with your audience. The Purpose, Picture, Plan and Team elements of the template form the basis of a vision for change. The thinking you've done around your likely team, schedule and governance should provide the headline information needed to support your case. By setting out the benefits alongside intended outcomes you can hope to inspire leadership commitment to the approach.

The Storytelling Template can help you structure a presentation or briefing note. Whichever form you choose to deliver, we suggest you keep it simple, succinct and choose engaging visuals. Be disciplined about what and how much you include. Decide the length of presentation you wish to deliver and tailor your content accordingly. Speaking out loud at an

average speed you can expect to say approx. 150 words per minute. You will be able to adapt the content for use with other audiences at later stages, so it is worthwhile resolving and practicing your pitch. You will test and refine the vision as you engage with others.

As part of the briefing, invite feedback from your leadership representative to help you refine the vision. Request their commitment to support the approach and to seek wider endorsement from other leadership representatives. Whether through senior leadership meetings or some other way, you are seeking leadership action to secure endorsement from wider services of the place based approach and commitment from leads of relevant teams to collaborate.

After the briefing, reflect on what degree the vision presented resonated with your leadership figure. Had you clearly explained why the change was needed and was the future vision clear? Use any feedback or insights captured to refine the case.

Learning Points:

Use storytelling techniques to make a compelling case.

Prepare and rehearse for impactful delivery.

Seek leadership input, endorsement and action.

Reflect and refine the vision.

Resources:

Storytelling template (p80, 81)



HOW TO
Engage
Others



How to... Engage Others



Snapshot 2 Overview

Scenario

In Snapshot 2, we imagine you are putting together a plan to help you identify, engage and build relationships with key groups of people to inform your spatial strategy for housing as part of your Regional Spatial Strategy, Local Development Plan, Local Housing Strategy or Strategic Housing Investment Plan.

Learning Outcomes

Through Snapshot 2, you will see how to plan for engagement with others as part of the spatial strategy for a development plan or housing strategy.

You will see how to map and prioritise relevant audiences and how to plan to involve them in defining shared place objectives and identifying priority locations of new housing led areas. At the end of this snapshot you will understand:

- Benefits of engagement and collaboration.
- Importance of purpose and focus in your engagement.
- How to map and prioritise audiences.
- Consider engagement methods and inclusion.
- Schedule for timely engagement.
- Communicating your plan.
- Understand how to apply this learning in practice, by following the snapshot steps and completing associated templates for your own place.

Before You Start

If you haven't already, read through or [watch the place skills for housing series overview](#) and...

Complete Snapshot 1, which explains factors influencing quality of place in new housing-led development and sets out how to develop corporate alignment around a vision for change.

Why... Engage Others



Engagement and collaboration are essential elements of a place-based approach. As the Place Principle sets out, for a place-based approach to succeed, those with a key role need to work together to agree shared ambitions and align efforts so that investments work harder.

Snapshot 2 recognises that place quality in new housing led development is impacted by the decisions, actions and investments of many groups with a role. Key groups include: relevant corporate services; the development industry; local communities of interest; key agencies; and Councillors.

The public sector is well placed to lead in initiating this work. The early stages of development plan preparation offer an ideal window to coordinate discussions about the spatial implications of planned activities and investments. Recent changes to the planning system have introduced a statutory link between spatial planning and community planning and requirements to consider housing, health and education needs for local communities in development plans. There are many benefits to working in this way early and throughout your process...

- Involving key audiences in evidence gathering, collaborative visioning, prioritising and briefing for priority places can build collective understanding and action to make successful places.
- Working collaboratively early at key stages gives the best potential to align efforts and activities to

influence for positive outcomes in the long-term public interest.

- Engaging the development community in collaborative visioning and briefing can inform the understanding of viability and deliverability and develop shared understanding of local needs and expectations for place quality.
- Engaging local communities of interest who live, work or operate business and services will provide insights, develop shared understanding of issues and opportunities and improve prospects for collective action.
- Involving the Key Agencies Group at an early stage can bring a range of skills, expertise and resources to support a place-based approach.

If this approach means doing things differently in your place it is helpful to remember there is strong support at a national level and an expectation now through legislation, policy and the place principle for place-based approach. There are examples of authorities already taking the lead on collaborative work to develop and enshrine development frameworks and masterplans into development plans. See case study examples for Aberdeen, Loch Lomond and Trossachs and Moray.

In Snapshot 2 you will see how to establish engagement in your place by mapping and prioritising those with a role or interest and planning for timely, inclusive and purposeful engagement at key points through the process.

Learning Points:

Effective engagement is essential to a place-based approach.

Planning is well placed to take a lead in bringing varied interests together.

Community planning vision and priorities should inform spatial planning as well as service planning for related functions including housing, education, transport.

Engage interests early and throughout.

Plan for meaningful engagement to reduce risks and long term costs.

There is strong support and expectation in policy for engagement.

Resources:

The Place Principle (p59)

Countesswells, Aberdeen City Council Case Study (p52, 53)

LIVEPark - Loch Lomond and Trossachs Case Study (p56, 57, 58)

Quality Audit Tool, Moray Council Case Study (p54, 55)

[KAG Green Recovery Support Place Planning for Decarbonisation](#)



Step 1 | Map Audiences



In Snapshot 1 you mapped a notional 'project team' and identified departments with likely knowledge or expertise to inform your approach. Following leadership approval for a place-based approach, revisit this map and team structure and identify individuals from relevant departments who will take project team or specialist roles in the project. Resources are available on team roles and relevant skills for project teams that could help with this.

Map other audiences with an interest, role or relationship to neighbourhood quality in your place now too. Think about who might hold relevant knowledge, information or insights. Who are you going to need to work with to define the objectives for the place? And who might present a barrier? Broad groups to consider involving in creating a shared vision and brief include:

- Local Authority - relevant council services
- Community - external communities of interest
- Market - development community
- Agency - Key Agencies and service providers

Use your list to map the audiences. A template is provided to help you with this. It includes some suggestions for each group to get you started. Depending on the scale of your project you could choose to complete one overall map, or individual maps for broad groups or sectors. This is not an activity to do in isolation. Others will hold relevant local knowledge, so seek input from colleagues and others to your initial audience mapping.



Learning Points:

Reflect on what skills are needed in the team.

Map audiences and plan for engagement early.

Map audiences to help visualise who to engage.

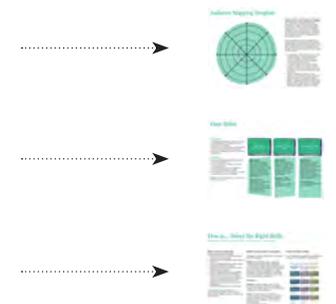
Seek input from others to test and refine your mapping.

Resources:

Audience Mapping template (p76)

Team Roles (p78)

How To... Select The Right Skills (70)



Step 2 | Purpose and Timing

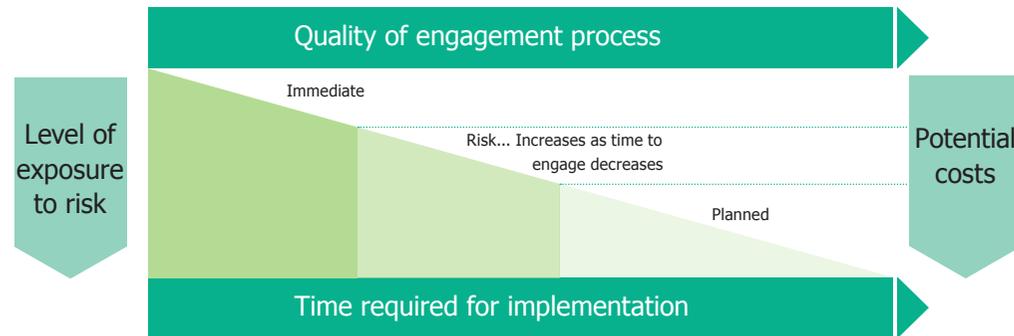


For engagement to be effective, it is important to have a clear understanding of its purpose and to choose the optimum timing.

There is a link between the timing and quality of engagement and the outcomes. Timeframes that are too tight can compromise meaningful engagement. Risks around the quality of outcomes increase as the time to engage decreases. By planning for meaningful engagement at key points throughout your process, you will set the conditions to develop strong relationships and partnerships with others involved. In doing so you will minimise risk of poor outcomes and long-term costs.

Revisit the schedule you developed in Snapshot 1 and consider the points in the process that you proposed engagement with key audiences. Think in more detail now about what you seek to achieve from those engagements. What is the purpose of engagement? Think about the audiences you need to involve, engage, and inform and decide the best timing for initial and ongoing engagement. The Purpose of Engagement Resource can help you with this.

Module 2 Briefing for Place Quality looks more closely at how to engage others in producing collective briefs for development proposals. Module 3 Influencing for Place Quality looks at engaging others in the planning, design and delivery phases to achieve quality outcomes.



Time and quality

When undertaking engagement, the timeframe to do so can sometimes create significant challenges. There are times when “urgency” creates precedence over good practice. This diagram articulates the risk imperative that can result and the resulting challenges.

- Immediate/urgent approaches to engaging with minimal time reduces the quality of the engagement and increases the risk to the outcome.
- A planned approach allows for more time to enable deeper engagement and achieve a greater outcome with minimal risk to all.
- Potential costs are reduced with more time to plan and engage effectively.
- Relationships are improved and strengthened with

Learning Points:

Be clear on the purpose of engagement.

Engagement has different purposes and benefits at different stages.

Understanding the purpose of engagement will inform who to involve and when.

Resources:

Purpose Of Engagement resource (p21)

Source: [Time and Quality Diagram](#)

Purpose and Timing



Stage	Collective Vision For What Makes A Good Neighbourhood	Spatial Strategy - Working Together To Find The Best Locations For Change	Collective Briefs For Priority Places
Purpose	<ul style="list-style-type: none"> To develop collective understanding of shared strategic priorities and vision for change across a whole place, linked to the Local Outcomes Improvement Plan. To exchange knowledge and insights about planned activities, programmes and investments. 	<ul style="list-style-type: none"> Exchange knowledge and information about planned activities and investments at an area level. Identify desired outcomes and opportunities for collaboration in priority areas. Test and refine the spatial strategy and the shared vision for change. Plan for later engagement on priority areas. 	<ul style="list-style-type: none"> Shared vision and brief for change for priority locations in local plans and housing strategies. Exchange knowledge and identify collective needs and opportunities. Identify opportunities for collaboration and collective action to inform initial briefs for key areas or sites. Plan for engagement on detailed briefs for key locations.
Who and When	<ul style="list-style-type: none"> Early with corporate teams and priority audiences. Test and refine with others. 	<ul style="list-style-type: none"> Early with corporate teams and priority audiences. Test and refine with others. 	<ul style="list-style-type: none"> Early with priority audiences. Prior to inclusion in a plan or strategy. Test and refine with others.
Tips	<ul style="list-style-type: none"> Depending on the scale and nature of place, could combine with identifying priority areas for collaborative action with your corporate leadership group. Aligned vision and priority areas identified can inform an initial spatial strategy to test and refine with others. You may choose to repeat or supplement this strategic session with input from other high priority audiences. 	<ul style="list-style-type: none"> You may need to plan for a series of engagements with different audiences across time depending on the scale, number, significance or sensitivity of priority places you identify. Depending on the scale and nature of place, it may be possible to combine this with identifying briefing information with key audiences. 	<ul style="list-style-type: none"> Depending on the scale and nature of place, it may be possible to combine this with identifying priority areas for collaborative action with key audiences. Plan for engagement at strategic whole place level, and then for a series of engagements for relevant stakeholders at an area based level for each priority area.

Step 3 | Methods and Inclusion



Consider how you will communicate clearly and regularly with the range of people, organisations and communities you identified in your audience mapping.

Prioritisation will help you in planning what approach to take to engagement. Consider who you need to involve, engage or keep informed. Prioritise the audiences you have mapped according to their level of interest and influence. You can repeat this mapping at later stages to identify key audiences for priority places within your area. An audience prioritisation template is available that can help you do this.

Consider what methods to use for each audience at key stages of the process:

- evidence gathering
- aligning a shared vision for change and identifying strategic spatial priorities to inform a spatial strategy
- developing shared local visions for change and spatial priorities to inform initial briefs for priority areas;
- input from wider communities of interest to the vision, spatial strategy and priority areas.

Think about the interest and influence of each of your audiences and tailor the methods and approaches you choose to fit. Some examples of methods include: Meetings; Workshops; Focus Groups; Questionnaires; Place Standard Exercises – online or in person; Blogs; Newsletters; Social Media Campaigns.

An audience communication template is available that can help you do this and collaborative workshops are covered in more detail in snapshot 3&4.

For consultation with local communities, think carefully about how to engage a broad representation of interests and demographics. Think too about how you can offer support to help overcome barriers to engagement. For good practice recommendations about working with communities, see SCDC's [National Standards for Community Engagement](#). And for tools and guidance to promote inclusion and accessibility you can refer to [Include Us All](#), Scotland's Inclusive Communication Hub.

Learning Points:

Use audience prioritisation to inform your approach.

Tailor your engagement approach to fit your audiences.

Seek a representative range of community interests.

Plan for inclusive engagement.

Resources:

Audience Prioritisation Template (p75)



Audience engagement template (p97)



[National Standard for Community Engagement](#)

[Include Us All](#)

“Community engagement is a purposeful process which develops a working relationship between communities, community organisations and public and private bodies to help them to identify and act on community needs and ambitions.”



Step 4 | Plan for Engagement



If you are undertaking this process as part of preparation for your Regional Spatial Strategy, Local Development Plan or Strategic Housing Investment Plan, consider how to align with wider engagement planning and participation statements for those.

The Planning (Scotland) Act 2019, introduces a statutory link between Community and Land Use Planning, so think carefully about how community planning and your Local Outcome Improvement Plan can complement and inform development planning processes. Use your planning to seek input and alignment with engagement for other services too wherever possible to support a whole place approach.

Good practice suggests formalising your thinking into an engagement plan. A basic Engagement Plan template is provided. It may also be helpful to visualise this along a timeline. A template timeline example is provided.

There are existing examples of this kind of engagement being done to good effect. In Shetland

a community wide online Place Standard consultation was timed to inform service planning for multiple departments, limiting risk of consultation fatigue in the community.

In Loch Lomond and Trossachs National Park, charrettes and place standard exercises by Community Planning informed Community Action Plans which fed into early preparations for the local development plan.

In Strathard, partnership work with local communities is supporting co-production of a land use and rural development framework to guide climate conscious development and land use in the Strathard area over the next 10 years.

In North Ayrshire, the Place Standard tool was used to capture community input to locality plans that also helped to inform selection of new locations for housing led development as part of the development planning process.

Learning Points:

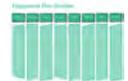
Plan for meaningful engagement.

Seek alignment with engagement for other services.

Seek learning from elsewhere to inform your approach.

Resources:

Engagement Plan Template (p100, 101)



Engagement Timeline Template (p77)



LIVEPark - Loch Lomond and The Trossachs Case Study(p56, 57, 58)



[Shetland Place Standard Case Study.](#)

[Strathard Pilot, Carbon Conscious Places Report](#)

[North Ayrshire Place Standard Case Study.](#)



Top: Countesswells, Aberdeen
Credit: OP-EN



Bottom left: Countesswells,
Aberdeen, Credit: OP-EN
Bottom right: Quality Audit Moray,
LAUDF meeting.

HOW TO
Develop
Whole Place
Priorities



How to... Develop Whole Place Priorities



Snapshot 3 Overview

Scenario

In Snapshot 3, we imagine you are hosting a workshop or series of workshops to engage priority audiences in informing the vision and spatial strategy for housing as part of your Regional Spatial Strategy, Local Development Plan, Local Housing Strategy or Strategic Housing Investment Plan.

You will learn how to plan for and facilitate a workshop series to agree a shared vision and place objectives for housing led developments across a wide area and identify priority locations for further collaboration and engagement.

Learning Outcomes

Through skills snapshot 3 you will see how to engage others in the vision and spatial strategy for new housing led development as part of preparations for your regional spatial strategy, development plan or local housing strategy. At the end of this snapshot you will understand how to:

- Source relevant baseline information.
- Communicate and test the vision for change with input from others.
- Develop shared ambition and objectives to assist selection of suitable locations for housing led development.
- Identify priority areas for collaborative action to inform your spatial strategy.
- Apply this learning in practice, by following the snapshot steps and completing associated templates for your own place.

Before You Start

If you haven't already, read through or [watch the place skills for housing series overview](#) and:

- Complete Snapshot 1, which explains factors influencing quality of place in new housing led development and sets out how to develop corporate alignment around a vision for change.
- Complete Snapshot 2 which explains the benefits of engagement, the importance of timing and purpose and set out how to plan for who, when and how you would engage others.

Why... Develop Whole Place Priorities



Starting with a clear, joint understanding of the purpose and vision of a whole place before developing detailed policies for the delivery of its various elements offers the best foundation for a successful place-based approach. To create successful places, it is important to prioritise collective solutions over individual interests and the best way to do this is by looking at these interests together and the range of public goods that can be delivered. Places without such a shared spatial vision can flounder.

Working in this way means making choices based on long-term priorities over short-term ones. It means promoting innovation in the design of places, buildings, landscapes and infrastructure. It means working to ensure the whole community is represented in decisions that ultimately impact on their quality of life, health and well-being. It requires commitment from everyone involved in the multiple decisions and choices that ultimately shape our places.

This way of working needs strong local place leadership. Planners and the planning system are ideally placed to lead the wider community of council services, decision-makers, investors, designers and, above all, users towards this. Place leadership here can focus on the development of local, place-based 'visions' and spatial priorities for development plans that all involved can work to deliver. Outcomes from Local Outcome Improvement Plans as well as other key

plans, strategies or investments with spatial impacts can be aligned in the wider public interest.

Workshops are a good way of bringing people together to undertake this work collectively, enabling:

- Capture of needs, priorities, evidence and insights to inform decision making.
- Alignment of investments, activities, funding in the long term public interest.
- Building of collective purpose, direction and action to make successful places.
- Creation of shared ambitions and expectations to drive place quality through design and decision making to delivery.
- Collective consideration of place capacity and development benefits to inform spatial strategy (replacing a standard call for sites approach).

Snapshot 3 takes you through steps to prepare for and conduct strategic workshop(s) to engage key audiences in identifying a shared spatial vision and priorities for housing led development as part of your development plan or housing strategy process. Snapshot 4 sets out how to engage wider communities of interest for priority areas.

Learning Points:

A shared spatial vision is essential a place-based approach

There are benefits to identifying spatial priorities collectively

Resources:

[Key Agency Green Recovery Support Offer](#)

[Carbon Conscious Places Report](#)

Step 1 | Revisit Research



Good research will give you the best foundation to make evidence based decisions. Seeking relevant sources on the existing social, environmental and economic contexts and conditions will inform your understanding of how your place works and on the local sense of place, which will help shape solutions that are specific to your place.

With your project team, build on the earlier headline research from Snapshot 1, gathering further baseline information on the local social, economic and environmental contexts to build understanding about the whole place.

Capture data on the role of the area in its wider context. What role and relationship does the place play to neighbouring areas, and in a regional and national context? What are the distinct characteristics that will influence location and quality of place for new housing led development in this place? Continue to consider and reflect on wider strategic agendas driving changes too, particularly as they relate to housing needs in your place. A resource is provided with suggestions of relevant sources of social, environmental and economic data.

Capturing this information in consultation with the internal leads you identified in Snapshot 2 will help raise awareness of the place-based approach you intend to take. As you collect information, seek headline insights, issues and areas with apparent need or scope for growth or change. Where there are gaps in knowledge, consider areas that might warrant further research or investigation by yourself or others.

In preparation for workshop briefings, revisit the Storytelling Template and leadership pitch you developed in Snapshot 1. Update it with headline insights from research and with relevant audiences in mind. Set out the rationale for the place-based and collaborative approach being taken to the workshop, in line with the place principle.

Learning Points:

Research to develop understanding of sense of place.

Capture a strong evidence base to inform decision making.

Seek key insights about place contexts and conditions.

Seek key insights into people's needs and priorities.

Review and tailor the vision for change for key audiences.

Resources:

Snapshot 3 Data Pointers (p90)



Storytelling Template (p80, 81)



Step 2 | Prepare for Whole Place Workshop



Planning a workshop to consider the wider shared vision and spatial priorities, will need a clear workshop agenda, a set of workshop materials, a suitable venue or online platform and good facilitation.

Workshop invites should be tailored to clearly communicate why the participant's involvement is sought as well as the purpose of the workshop and the benefits of engagement. Revisit the audience mapping and prioritisation you did in Snapshot 1 to identify priority attendees. The Purpose of Engagement resource can help you tailor the invites. Prior to the workshop, share a summary of the schedule with those who are attending.

Workshop groups of around 5-7 people tend to work most effectively together. By mixing different knowledge and disciplines at each group, discussions will be more fruitful.

Design the agenda with a series of activities which flow from each other and support collaborative working and identification of shared objectives and actions. An example summary agenda is provided for early stage in the development plan process, which can be tailored with input from your team to suit your place. See the Strategic Workshop Facilitator Guide for more detailed notes on running a session.

Indicative Timing	Activity
30 mins	Set Up
10/15 mins	Participants Arrival (and refreshments)
5 mins	Introduction
10 mins	Setting the Scene
30 mins	Group Work - Session 1 Identify Common Strategic and Local Drivers for Change. Identify shared drivers or ambitions for change at a strategic and local level.
5/10 mins	Session 1 Group Feedback
60 mins	Group Work - Session 2 Identify Priority Areas for Collaborative Action. Identify location of priority areas for co-ordinated action, by mapping planned and anticipated change, agreeing broad areas and testing against ambitions and future scenarios.
5/10 mins	Session 2 Group Feedback
20 mins	Group Work - Session 3 Next Steps and Stakeholders. Discuss and outline the next steps for collaboration and engagement.
5/10 mins	Close

See whole Place Workshop Facilitator Resource for further guidance (p85, 86, 87)



Workshop resources to support group discussions will need to be identified and prepared in advance.

- **Maps:** Include large base maps of the wider area for each group. It may be useful to have 2 blank maps per group exercise to populate during sessions 1 and 2 as well as a series of maps or diagrams outlining the baseline information gathered.
- **Resources:** If you are using SWOT analysis as part of your workshop, then make large format versions available to capture group discussions.
- **Pens and post-it notes:** Each table should have a set of coloured marker pens to draw on the maps and post-it notes to capture key points.
- **Projection/Screen:** A screen and projector is required to support the introduction and scene setter sessions.
- **Colleagues:** Enlisting colleague support to guide each group will help capture insights to feed into the workshop report.
- Digital options are available to support online delivery of workshops and collaborative whiteboard activity while physical meeting options are restricted.

Venue Choose a suitable space and set up to support effective group work. The room should be large enough for group tables to be spaced for effective discussion but also ensure that the projection/screen can be viewed. The layout of the tables may need to be altered during the set up to ensure good conditions for the workshop.

Accessibility For advice on planning for inclusive engagement see SCDC's [National Standards for Community Engagement](#). And for tools and guidance to promote inclusion and accessibility, [Include Us All](#) , Scotland's Inclusive Communication Hub.

Learning Points:

Good preparation supports successful delivery.

Taylor invites and agenda to work for your place.

Develop relevant resources to inform discussions.

Choose a suitable venue or online tool.

Resources:

Whole Place Workshop Facilitator Resource (p85, 86, 87)



SWOT Analysis (p92)



[KAG Green Recovery Support Offer](#)

Step 3 | Facilitate Whole Place Workshop



To support you and your team in taking on facilitation roles, a workshop resource is provided with detailed notes and tips on facilitating a strategic vision and priorities workshop session.

Set aside time to prepare and rehearse the running of the session with input from your team. If you are hosting the session online, consider how to adapt elements of the agenda and facilitation. For example, baseline mapping information could be collated on online whiteboards in advance to inform discussions. Colleagues could be briefed to note discussion points or draw spatial information onto whiteboards as discussions are ongoing.

Good facilitation helps steer participants to share their knowledge and agree collective objectives in a manner that encourages participation, creativity and ownership. To demonstrate good facilitation during a workshop, the following factors should be considered:

- Communicating clear workshop instructions.
- Communicating the purpose of the workshop.
- Active listening.
- Creating an environment which is comfortable to share and discuss points.
- Managing the workshop timings and keeping groups on task.

- Recording and reflecting key discussion points
- Staying neutral and allowing others to input
- Prompting points and drawing out information from all participants

See the [Whole Place Workshop Facilitator Guide](#) for specific pointers on facilitating this session.

Support for this way of working is available from A&DS and through the Key Agencies Group Green Recovery for projects that meet priority criteria.

Learning Points:

Good preparation supports successful facilitation.

Brief and prepare those with facilitation roles.

Resources:

Whole Place Workshop Facilitator Guide (p85, 86, 87)



[KAG Green Recovery Support Offer](#)

Step 4 | Reflect, Refine and Report



Further workshops: Depending on how you planned for engagement, it may be necessary to run a similar workshop to the above with the other governance or leadership groups, politicians, and/or other strategic or community stakeholders to gather their input in at this whole place scale of the spatial strategy process.

Reflect on vision and spatial strategy: Following each workshop, hold an action planning workshop with project team colleagues to reflect on output of workshop(s), to reflect and refine the vision for change and to agree the approach to the next workshop(s) which will consider the priority areas identified in more detail.

What do the spatial priorities identified tell you about likely locations for change or growth in housing led development? In the priority places identified, is land available in public or private ownership? Might consolidation be required? Before embarking on a standard call for sites, reflect on how a focus might be brought to priority areas.

Report: A report of the output of the workshop should summarise the key points discussed, the identified locations agreed during the workshop and outline the next steps. This should be circulated to the workshop participants for review. Its recommended that the report is prepared and circulated no longer than two weeks after the workshop. Communicate requirements for any additional information or input to future engagements from colleagues.

Learning Points:

Repeat whole place workshop as necessary with other key audiences.

Reflect as a team on shared vision and priority areas.

Update the vision for change based on workshop discussions.

Communicate shared vision, spatial priorities and next steps in a report.

Resources:

[Carbon Conscious Places Report](#)



HOW TO

Develop Local Place Priorities

How to... Develop Local Place Priorities



Snapshot 4 Overview

Scenario

In this snapshot we imagine you are hosting a workshop or series of workshops to engage others in shaping the vision and priorities for key areas of housing led growth or change identified in Snapshot 3.

You will see how to plan for and facilitate a workshop series to develop shared place objectives for priority areas identified as part of the spatial strategy for the Regional Spatial Strategy, Local Development Plan, Regional Housing Strategy or Strategic Housing Investment Plan in your place.

Learning Outcomes

Through skills snapshot 4 you will see how to engage others in shaping the vision and spatial priorities for key areas identified in snapshot 3. You will see how to prepare for, conduct and reflect on a workshop to develop shared place objectives for the priority area(s) to inform the spatial strategy at a local area level. At the end of this snapshot you will understand how to:

- Source relevant baseline information.
- Create a clear workshop agenda and set of materials.
- Communicate and test the vision for change and spatial strategy with input from others.
- Create collaborative briefs to inform action for priority areas to inform your spatial strategy.
- Apply this learning in practice, by following the snapshot steps and completing associated templates for your own place.

Before You Start

If you haven't already, read through or watch the [place skills for housing series overview](#) and:

Complete Snapshot 1, which explains factors influencing quality of place in new housing led development and sets out how to develop corporate alignment around a vision for change.

Complete Snapshot 2 which explains the benefits of engagement, the importance of timing and purpose and set out how to plan for who, when and how you would engage others.

Complete Snapshot 3, which explains how to plan for and facilitate a workshop(s) to collaboratively develop a vision and strategic spatial strategy for change.

Why... Develop Local Place Priorities



As Snapshot 3 highlighted, success requires collective solutions to be prioritised over individual interests. Considering ambitions and spatial priorities together at an early stage is the best way to do this is at a local priority area level too to support delivery of overall vision for the place. Any competing issues at a local level can be resolved and activities and investments aligned in the wider public interest.

Planners and the planning system are ideally placed to lead the wider community of decision-makers, investors, designers and, above all, users towards local, place-based visions and briefs that all involved can work to deliver.

Working in this way requires commitment from everyone involved. Workshops are a good way of bringing people together to undertake this work collectively. Workshops at a local area level when developing a spatial strategy will enable:

- Capture of local needs, priorities, evidence and insights to inform decision making.
- Alignment of investments, activities, funding in the long term public interest.
- Building of collective purpose, direction and action to make successful places by the public sector, third sector, private sector and communities.

- Creation of shared ambitions and expectations to drive place quality through design and decision making to delivery.
- Collective consideration of place capacity and development benefits to inform spatial strategy (replacing a standard call for sites approach).
- Collective input to high level briefs for priority areas that can be enshrined in development plans.
- Building of trust and acceptance of the need for development.

Snapshot 4 sets out steps to prepare for and host workshop(s) to engage communities of interest to identify needs and priorities for priority areas for housing led development. You will see how to apply research, audience mapping and storytelling skills in workshops. And see how to capture key urban design principles for areas of growth and change to inform high level briefs in your development plan or strategy.

Does your approach call for detailed briefs for key sites as part of plan process? Then refer to Skills Module 2 for guidance on collaborative briefing to inform masterplanning and design development.

Learning Points:

Align collective interests and activities to support a place-based approach at a local level.

There are benefits to identifying spatial ambitions and priorities collectively.

Collective input can shape local, place-based strategic briefs for inclusion in development plans.

Support for this way of working is available through KAG place making group.

Resources:

[Key Agencies Group Green Recovery Support](#)

Step 1 | Revisit Research



As Snapshot 3 highlighted, good research offers the best foundation for evidence based decision making. Relevant sources on the existing social, environmental and economic contexts will inform understanding of local conditions and senses of place, which will in turn help shape solutions that are specific to each place.

With your project team, build on the headline research in Snapshot 1 & 3 with further local data on the **social, economic, environmental contexts** to build understanding of the senses of place particular to the priority areas. Capture data on the role of the area in its wider context. What role and relationship do the places play to neighbouring areas? What are the distinct characteristics that will influence location and quality of place for new housing led development in this place? Continue to consider and reflect on wider **strategic agendas** driving changes too, particularly as they relate to housing needs in the priority areas.

A resource is provided with suggestions of relevant sources of social, environmental and economic data to consider at a local area level.

Capturing this information in consultation with the internal leads will help build familiarity with the place based approach. Collect insights and issues to help identify locations with need or scope for growth or change. Where there are gaps in knowledge, consider areas that might warrant further research or investigation by yourself or others.

In preparation for workshop briefings, revisit the storytelling template and leadership pitch developed in Snapshot 1 and updated in Snapshot 3. Tailor it with headline insights from area based research and with relevant audiences in mind. Set out the rationale for the place-based and collaborative approach being taken to the workshop, in line with the place principle.

Learning Points:

Research local needs, conditions and sense of place specific to priority areas.

Capture strong evidence base to inform decision making.

Seek alignment with Community Planning and your Local Outcome Improvement Plan.

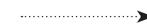
Tailor vision for change to reflect local issues and audiences.

Resources:

Snapshot 4 Data Pointers (p91)



Storytelling Template (p80 - 81)



Step 2 | Prepare for Priority Area Workshop



Planning a workshop to develop shared local ambitions and spatial priorities for priority areas will need a clear workshop agenda, a set of workshop materials, a suitable venue or online platform and good facilitation.

Design the agenda for the priority area workshop(s) with a series of activities which flow from each other and support collaborative working and identification of key place objectives. Each priority area may have different groups of key stakeholders with relevant input on the place context, issues and opportunities at this spatial scale. It may be necessary to hold a series of workshops focused on the different geographies of individual priority areas. An example workshop agenda is provided which can be adapted and tailored to suit your place.

See the Priority Area Workshop Facilitator Guide for more detailed notes.

Indicative Timing	Activity
30 mins	Set Up
10/15 mins	Participants Arrival (and refreshments)
5 mins	Introduction Purpose - to create a spatial strategy to reflect shared place objectives for the priority area(s).
10 mins	Setting the Scene Introduction and input to wider vision and priority areas.
30 mins	Group Work - Session 1 Understanding Priority Areas. Identify local assets, issues, opportunities, needs and conditions. Session 1 Group Feedback
60 mins	Group Work - Session 2 Identifying Locations for Growth or Change in Priority Areas. Identify best locations for change or growth to address vision for change and local needs.
5/10 mins	Session 2 Group Feedback
20 mins	Group Work - Session 3 Setting the Spatial Design Objectives. Identify key spatial design objectives for places with best potential for growth or change to inform high level briefs.
5/10 mins	Session 3 group feedback
5/10 mins	Close

Step 2 | Prepare for Priority Area Workshop



Workshop invites should be tailored to clearly communicate why the participant's involvement is sought as well as the purpose of the workshop and the benefits engagement. Revisit the audience mapping and prioritisation you did in earlier snapshots and update it with relevant local area contacts identified through subsequent workshops and research. Prior to the workshop, share a summary of the schedule with those who are attending. The Purpose of Engagement resource can help you tailor the invites.

Workshop groups of around 5-7 people tend to work most effectively together. By mixing different knowledge and disciplines at each group, discussions will be more fruitful.

Workshop resources to support group discussions will need to be identified and prepared in advance.

- **Maps:** Include large maps of the area for each group to refer to and populate. Baseline information.
- **Tools:** Copies of the place standard or SWOT tool to complete (1 per each participant and a large version for the table). Copies of Persona Templates and Development Quality and Form Resource as required.
- **Photographs:** Printed photographs of the priority areas for session 1 and good examples for session 2.

- **Pens and post-it notes:** Each table should have a set of coloured marker pens to draw on the maps and post-it notes to capture key points.
- **Projection/Screen:** A screen is required to support the introduction and scene setter sessions.
- **Colleagues Support:** It may be helpful to have a group facilitator and scribe for each group. Enlisting colleagues support to guide each group will help feed into the workshop report.
- Digital options are available to support online delivery of workshops and collaborative whiteboard activity while physical meeting options are restricted.

Venue Choose a suitable space and set up to support effective group work. The room should be large enough for group tables to be spaced for effective discussion but also ensure that the projection/screen can be viewed. The layout of the tables may need to be altered during the set up to ensure good conditions for the workshop.

Accessibility For advice on planning for inclusive engagement see SCDC's [National Standards for Community Engagement](#). And for tools and guidance to promote inclusion and accessibility, [Include Us All](#), Scotland's Inclusive Communication Hub.

Learning Points:

Good preparation supports successful delivery.

Tailor invites and agenda to work for your place.

Develop relevant resources to inform discussions.

Choose a suitable venue or online tool.

Resources:

Priority Area Workshop Facilitator Guide (p93, 94, 95)

SWOT Analysis (p92)

Persona Tool (p99)

Place Quality and Development Form (p96)

[Place Standard Tool](#)

[KAG Green Recovery Support Offer](#)



Step 3 | Facilitate Priority Area Workshop



To support you and your team in taking on facilitation roles, a workshop resource is provided with detailed notes and tips on facilitating a strategic vision and priorities workshop session.

Set aside time to prepare and rehearse the running of the session with input from your team. If you are hosting the session online you may need to consider how to adapt elements of the agenda and facilitation. For example, baseline mapping information could be collated on online whiteboards in advance to inform discussions. Colleagues could be briefed to note discussion points or draw spatial information onto whiteboards as discussions are ongoing.

Good facilitation helps steer participants to share their knowledge and agree collective objectives in a manner that encourages participation, creativity and ownership. To demonstrate good facilitation during a workshop, the following factors should be considered:

- Communicating clear workshop instructions.
- Communicating the purpose of the workshop.
- Active listening.
- Creating an environment which is comfortable to share and discuss points.
- Managing the workshop timings and keeping groups on task.
- Recording and reflecting key discussion points.
- Staying neutral and allowing others to input.
- Prompting points and drawing out information from all participants.

See the Priority Area Workshop Facilitator Guide for specific pointers on facilitating this session.

Support for this way of working is available from A&DS and through the Key Agencies Group Green Recovery for projects that meet priority criteria.

Learning Points:

Good preparation supports successful facilitation.

Brief and prepare those with facilitation roles.

Resources:

Priority Area Workshop Facilitator Guide (p93, 94, 95)



[KAG Green Recovery Support Offer](#)

Step 4 | Reflect, Refine And Report



Further workshops: Depending on how you planned for engagement, it is likely you will need to run a series of similar workshops for individual priority areas to gather input from relevant communities of interest in to this stage of the spatial strategy process.

Reflect: Following each workshop, hold an action planning meeting with project team colleagues to reflect on refinements to the vision for change, the spatial strategy or the priority areas following knowledge and insights captured through workshops.

Look to build agreement around priority areas for development, selection of suitable sites and indication of where more detailed site briefs or other design tools are desirable. What do the spatial priorities identified at a local area scale tell you about preferred locations for change or growth in housing led development? Which areas show most potential to deliver on the wider vision for change?

Before embarking on a standard call for sites, reflect on how a focus might be brought to land with capacity in priority areas. In the priority places identified, is land already available in public or private ownership? Is consolidation an option to consider? Before embarking on a standard call for sites, reflect on how a focus might be brought to priority areas.

Report: A report of the output of the workshop(s) should summarise the key discussion points around ambitions for wider areas, ambitions and spatial priorities for key locations and a summary diagram outlining the key non-negotiables to inform high level briefs. This should be circulated to the workshop participants for review. It is recommended that the report is prepared and circulated no longer than two weeks after the workshop. Communicate requirements for any additional information or input to future engagements from colleagues.

Learning Points:

Repeat workshop as necessary to cover all priority areas.

Reflect as a team on shared vision and non-negotiables for priority areas.

Communicate shared ambitions, spatial priorities and next steps in a report.

HOW TO
Brief For
Place Quality



How to... Brief for Place Quality



Snapshot 5 Overview

Scenario

In this Snapshot we imagine you are looking to establish Strategic Development Briefs for priority areas of change for housing led development as part of your Regional Spatial Strategy, Local Development Plan or Strategic Housing Investment Plan preparation.

Learning Outcomes

Through Skills Snapshot 5 you will see how to prepare and illustrate strategic briefs for inclusion in plans and strategies and select appropriate design tools to shape design, development and delivery. You will see how to establish conditions for shared delivery of successful places through action plans or partnership agreements for strategic briefs that influence for place quality in key areas of housing-led growth or change.

- Communicate vision for change and wider spatial strategy.
- Communicate collaborative briefs to inform action in priority areas.
- Establish conditions for future collaborative action through action plans.
- Selection of suitable design tools to steer place quality (development framework/ masterplan / development brief / Masterplan Consent Area (MCA)/ Design Codes).
- Apply this learning in practice, by following Snapshot steps and completing associated templates for your own place.

Before You Start

If you haven't already, read through or [watch the place skills for housing series overview](#) and:

- Complete Snapshot 1, which explains factors influencing quality of place in new housing led development and sets out how to develop corporate alignment around a vision for change.
- Complete Snapshot 2 which explains the benefits of engagement, the importance of timing and purpose and set out how to plan for who, when and how you would engage others.
- Complete Snapshot 3, which explains how to plan for and facilitate a workshop(s) to collaboratively develop a vision and strategic spatial strategy for change.
- Complete Snapshot 4, which explains how to plan for and facilitate a workshop(s) to collaboratively develop ambitions and spatial priorities for priority areas for growth and change.

Why... Brief for Place Quality?



We have seen that a place-based approach, as set out in the Place Principle calls for joint action by the public sector, third sector, private sector and communities.

The collaborative approach outlined in previous Snapshots will have established a shared understanding of a place, its services, land use and buildings and shared ambitions for future change and growth. It is also likely to have informed the need for further collaboration and joint action on more detailed briefing, design development and delivery in areas of growth or change.

Strategic Briefs in development plans offer the opportunity to set the bar for place quality and establish key ambitions, priorities and principles in policy to help influence for better outcomes for people and communities.

Where priority areas have been identified for further collaborative action, strategic briefs can bridge the gap between the plan or strategy and the development of detailed collaborative briefs or supplementary guidance. Strategic briefs in this circumstance can determine preferred approaches or design tools to influence for place quality and require those to be prepared in advance of detailed proposals for key sites.

Strategic Briefs can also bridge the gap between a plan or strategy and planning applications for major sites outwith priority areas by performing a number of

functions such as promoting a site for development, interpreting plan policies, addressing site constraints or opportunities and requiring application of a suitable design tool to influence for design and place quality.

In these ways, Strategic Briefs can support place leadership by helping reduce uncertainty, communicating expectations for design and place quality to the development community and others, and setting the context for later evaluation and determination of planning applications.

This approach to inclusion of strategic briefs is in line with the aspiration for Local Development Plans (LDP) and Strategic Housing Investment Plans to remain concise and focused. There are examples of authorities already employing elements of this approach, for example Moray's LDP includes Place briefs for key sites. Aberdeen LDP identified priority areas for housing growth and set out requirements for collaborative masterplans to be developed. Loch Lomond and Trossachs National park worked closely with community planning to identify priorities for change and created rural development frameworks to influence form and location of housing development in their LDP.

Snapshot 5 sets out how to express the outcomes of collaborative engagement by considering and communicating key information about priority areas allocated for housing-led development in development plans or spatial strategies.

Learning Points:

Brief to communicate outcomes of collaborative engagement.

Brief to support place leadership.

Brief to set expectations around place quality use of design tools to shape future development.

Brief to align collective action to deliver place-based approach.

Resources:

Quality Audit Tool, Moray Council Case Study (p54, 55)



Countesswells, Aberdeen City Council Case Study (p52, 53)



LIVEPark - Loch Lomond And The Trossachs National Park Case Study (p56, 57, 58)



Step 1 | Develop a Strategic Brief



Collaborative engagement will have identified a shared vision and common priorities to inform Strategic Briefs for priority places with best potential for growth or change.

Review **the vision, place objectives and priorities** for each priority area based on workshop reports from engagements with communities and other key audiences into and **finalise** into a summary brief.

Place Objectives

The written objectives in a Strategic Brief for a priority place should set out common ambitions and key non negotiables identified through engagement with others. These are high level briefs. The aim is to be as concise and simple as possible to inform more detailed briefing at subsequent stages through design tools such as masterplans. You might choose to communicate...

What kind of place is this? Concisely highlight important points of place identity, context and character including its role and relationship to the surrounding and wider area. Draw on earlier research, workshop reports and pitches.

What kind of place do we want this to be?

Set out the collective story or vision for change in the place that emerged from workshops. Draw on storytelling resources, pitches and workshop reports.

What are the expectations for place quality?

Set out any key non-negotiable urban design elements highlighted through workshop engagement including ambitions for the character and/or location of aspects of development form:

- layout
- landscape
- mix
- scale and density
- details and materials, and
- partnerships for delivery and maintenance.

Learning Points:

Use storytelling techniques to concisely communicate outcomes of collaborative engagement.

Set out key common ambitions and key non negotiables to support delivery of place-based approach.

Resources:

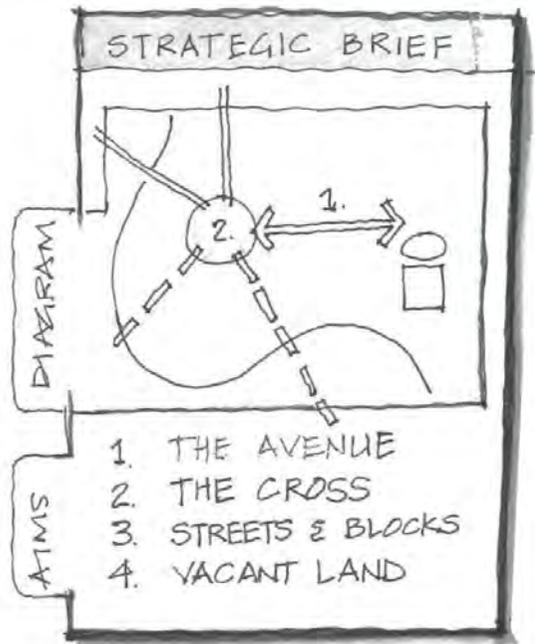
Storytelling template (p80, 81)



Place Quality and Development Form (p96)



Step 2 | Place Diagram



A Place Diagram should visually communicate key spatial design elements. It is a visual aid to support wider understanding of collective local needs and expectations. As a high level brief, diagrams are likely to be quite indicative. Aim for simplicity to inform more detailed briefing at subsequent stages through design tools such as masterplans for specific sites.

Developing simple and effective graphics to communicate spatial ideas from workshops is a skilled task that is likely to require input of urban design and graphic specialists. If you are developing graphics in-house, look to summarise the minimum possible graphic information to communicate the key ideas. Whether you are developing the diagram or briefing someone else, seek to communicate:

What kind of place is this? Illustrate important points of identity, context, character including the role and relationship of the area/site to its surrounding and wider context. Any key existing locations, infrastructure, services, assets, conditions, connections or constraints. Be proportionate and present the minimum.

What kind of place do we want this to be? What are the expectations for Place Quality?

A graphic representation of written objectives including key non-negotiable urban design requirements, opportunities or priorities identified through workshops with others. Consider use of limited visual examples or benchmarks to communicate aspirations for sense of the place.

See associated resource on How to...Communicate with graphics.

Learning Points:

Concisely communicate outcomes of collaborative engagement visually.

Resources:

Storytelling template (p80, 81)



Place Quality and development form (p96)



How to... communicate with graphics (p60 - 66)



External sources to support development of graphic skills include:

[Urban Design Compendium](#)

[Oxford Brookes University, Urban Design Techniques Part 1. - Creating a basic urban design structure.](#)

[Bartlett School of Planning, UCL](#)

Step 3 | Delivery Approach



As well as communicating shared vision and objectives, a strategic brief should establish initial steps for implementation. The following suggestions are offered in advance of guidance from Scottish Government on what to include in Delivery Plans associated with new procedures for Local Development Plans.

Delivering Better Places offers a helpful framework of eight elements common to successful places to consider for your place and team.

- **Ensure Good Leadership:** who will lead on steering vision and place objectives through detailed briefing, design, delivery and maintenance phases?
- **Co-ordinate Delivery:** what needs to happen, when, how and with whom to ensure place vision and objectives are met?
- **Control the spatial development framework:** what partnership approach and/or design tools will support delivery of the vision and objectives?
- **Achieve fast and co-ordinated regulatory approvals:** how will you work in partnership with others to achieve efficient regulatory approvals?
- **Exercise ownership power:** are there options to exercise ownership power? Is the site in public ownership? Is consolidation an option? How can partnerships be established to help shape quality outcomes?
- **Attract funding for advance infrastructure provision:** have options been explored for

advance funding of infrastructure which can help in establishing place quality?

- **Secure design quality through procurement strategies:** what can be done to embed expectations around design quality into procurement strategies?
- **Thereafter continue to invest and provide stewardship over time:** what arrangements can be established to support maintenance and stewardship to protect quality and sense of place in the longer term?

Reflect on the best approach to deliver the strategic briefs in your place and get input from Senior Colleagues and Key Stakeholders to options including:

- Implementation through the Local Development Plan or Strategic Housing Investment Plan. Using existing policy levers to designate the scale and scope of future action through development of a suitable design tool such as a development framework, masterplan, or design code for specific areas.
- Implementation using special policy levers such as Masterplan Consent Areas, Enterprise Areas or Small Area Plans as part of the Locality Plan process.
- Special purpose mechanisms such as Memorandum of Understanding, partnerships or direct implementation.

A resource is available with guidance on how to... **select the right design tool.**

Learning Points:

Choose the best delivery option to support a place-based approach in your place.

Resources:

How to...select the right design tool (p68, 69)



Delivering Better Places

Step 4 | Team Skills for Delivery



Skills mapping can help measure and identify the skills that will be valuable and necessary to steer design development and delivery within areas covered by strategic briefs. This may mean revisiting and adjusting the initial project team structure for the next phase of the process.

Open discussion around the skills needed to promote and assess the intended outcomes of the Strategic Development Brief should aid the identification of resources and partnerships that will be needed to deliver the ambition.

Revisit earlier mapping you did in snapshot 2 and think about skills for delivering strategic briefs. Are the skills and capacity available in house. Where might skills or additional capacity need to be brought in or outsourced and where might input from partners support the process?

Think particularly about options and timings for engagement of professional design skills in development of briefs, masterplans and other spatial frameworks for specific sites.

See resource on How to...Select the right Skills

Learning Points:

Reflect on skills needed to support delivery of a place-based approach in your place.

Resources:

Team Roles (p78)



Project Team Template (p79)



How to Select the right skills (p70)



Step 5 | Action Plans and Partnerships



Once you have chosen the best approach and team to deliver the briefs for your place, consider formalising those into Action Plans or Partnership Agreement to clarify who will do what and when to deliver the vision and objectives for priority areas.

If more detailed briefs are to be prepared for individual sites subsequently, you may choose to formalise these arrangements at the next stage when you are preparing detailed briefs for key sites.

This will be covered in more detail in Module 2: Briefing for Place Quality.

Case study examples highlight places where this type of approach is already happening...

Moray LDP - Settlement Statements

[Volume 2 Settlement Statements](#) (All)

[Elgin example](#)

[Quality Audit Tool, Moray Council](#)

[LAUDF 14 Newsletter](#)

Loch Lomond and Trossachs

[Loch Lomond & The Trossachs Park Adoption Plan section 3 / Place](#)

[Live Park - Loch Lomond and The Trossachs National Park](#)

Aberdeen Masterplan Process - for key strategic housing led allocations

[Aberdeen Local Adoption Plan](#) (see p44/45)

[Countesswells, Aberdeen City Council](#)

[LAUDF 14 Newsletter](#)

City of Edinburgh – Cammo Fields

[Edinburgh Local Development Plan](#) (p58/59)

[LAUDF 14 Newsletter](#)

North Ayrshire – Place Standard Exercises linking community planning and land use planning

[North Ayrshire Adopted Local Development Plan](#)

[Place standard site assessments](#)

Learning Points:

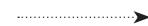
Briefs linked to plans or partnership agreements can formalise support to deliver a place-based approach.

Resources:

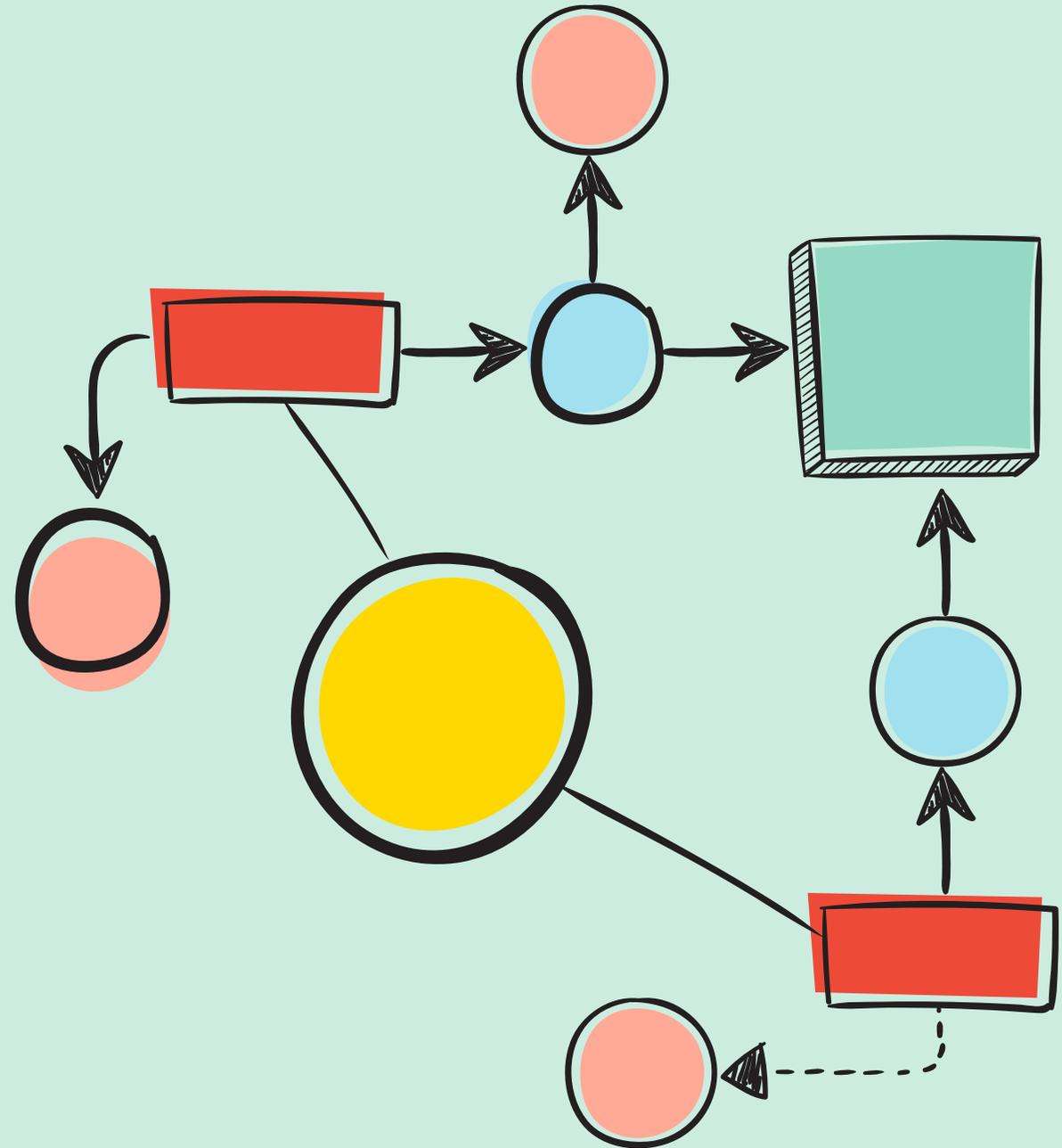
How to...Structure an Action Plan (p71)



How to...Structure a Partnership Agreement (p72, 73)



Mini case studies
(see links on the left)



Case Studies and Resources

Mini Case Study

Countesswells, Aberdeen City Council



This case study shows a local authority-led masterplanning approach to housing. The Local Development Plans (LDP) named key sites in its strategy for housing growth. Here, the authority's leadership shaped the quality and expectations of the developments. This approach allowed public and private sector parties to work collaboratively on design, development and delivery.

Project & approach

Countesswells is a development roughly 7km west of Aberdeen city centre that will accommodate a new community of around 7,000 people. The development will include 3,000 residential homes across all markets, two primary schools, an academy built to meet Curriculum for Excellence (CfE) standards, a medical centre with both GP and a dental practice, and a town centre with retail and commercial services. The Countesswells Development Ltd. (CDL) funding model allowed for significant up-front infrastructure delivery and major landscaping works. Open space resources were created prior to the first residents moving in. The built environment is arranged around a series of green spaces and connected by a network of paths and cycle routes.

Early IT connectivity was crucial. CDL arranged a partnership with a service provider to deliver a completely open network with speeds of over 1Gbps, the fastest in the UK at the time. Aberdeen City Council developed the masterplanning process with the Local Development Plan 2012 and became the first local authority to adopt an LDP under Scotland's 2010 planning reforms.

The Countesswells Development Framework and Masterplan guides the planning and delivery of the site. Stewart Milne Homes assembled a multi-disciplinary design team on behalf of the landowners in the area (the Countesswells Consortium). Following Aberdeen City Council's masterplanning guidance, the design team (led by OPEN) prepared the Framework and Masterplan in collaboration with the City Council's Strategic Place Planning service. Extensive public engagement took place during the preparation of the Framework, involving residents and neighbouring community councils.

Process and Practice

"Previously many developments in Aberdeen had been opportunistic and reactive to the oil industry," Sandy Beattie explains. Beattie led the team responsible for co-ordinating the briefing and delivery of this relatively atypical, but highly effective, model.

"Our Masterplan, Design and Conservation Team sits between the Development Management and Policy Teams in Planning... The masterplan team effectively features senior planners for masterplanning, urban design and conservation disciplines supported by



Top: View of the bike lanes and pedestrian walkways in Countesswells. **Bottom:** Aerial illustration of the Countesswells neighbourhood (Credit: Optimized-Environments).

“Continuity of involvement is important as each masterplan remains a live document with potentially many changing circumstances. This continual evolution of place needs to be carefully managed and the Masterplan team is well placed to address this”

Sandy Beattie, Team Leader (Masterplanning, Design and Conservation) Aberdeen City Council

planners and technicians. With finite resources and eleven masterplan zones across the City, rather than prepare masterplans, our role is to set the guidance and agree the brief with developers.”

Sandy Beattie points out the key elements of what a masterplan team can provide: “Leadership, in terms of design and placemaking,” and “Structure, to give certainty in delivering.”

“We are involved from the beginning and we control the process all the way through. We agree the parameters of the brief and are presented with a draft. We manage that draft process internally with all the different functions in the council. This ensures that all the different services understand the implications of any design or planning decision. We work with the appointed design team to ensure that the draft masterplan incorporates any advice, views and appropriate amendments. It then goes out to formal consultation both physically and online, the results of which are reported to committee to inform elected members prior to adoption of the masterplan. When the masterplan is finalised and the various planning applications come in, the masterplan team has a directorial role, ensuring compliance.”

What worked well

The Countesswells Masterplan identifies four key themes: context, identity, connectivity and communication. The development has released its first homes to market and will finish with the new town centre development in the next few years, which requires a critical mass of people.

Homes: “25% of affordable homes will be built in-line with the Local Development Plan policy. These homes are integrated within the phasing of the development and designed as part of each relevant character area.”

Community: “The fundamental idea of the whole area is to create this idea of a ‘walkable neighbourhood’ where everything’s connected and allows kids to walk to school, getting away from the practice of a drop-off at the front door. The benefits of this will be seen in years to come in terms of health and wellbeing.”

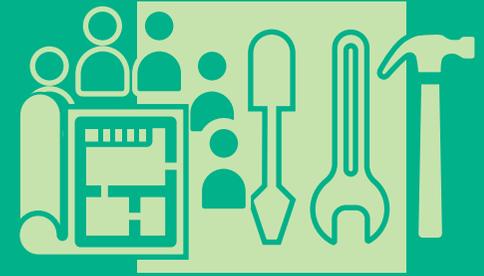
What were the Challenges

Education: “The first Primary School is consented to and currently underway. We’re working to create a secondary school with the public areas at street level, facing a major urban park. This campus approach would be a first for Aberdeen and Scotland, in contrast to school buildings that have fences around them and that don’t interact very well. (In retrospect) we would have liked to have pushed the education side much quicker by placing a pop-up school earlier in the development.”

Infrastructure: “We would have preferred to put all the infrastructure in first, but housing has to be delivered and sold there initially in order to support the infrastructure.”

Mini Case Study

Quality Audit Tool, Moray Council



This case study explores the use of a Quality Audit tool to influence housing developments. The tool is part of a range of ways Moray Council influences design quality, including the Local Development Plans (LDP), placemaking policy, masterplanning key sites and training for elected members. Embodying the place principle, the tool brought together council departments to collaborate and allowed for consistent responses to developments.

Project and Approach

Moray Council developed the Quality Audit tool to enable a consistent approach to the assessment of design and place quality across the authority. Placemaking was one of three policy priorities in the 2015 local plan. From this, the Quality Audit tool was developed to address design and placemaking issues with developers.

Developed in-house through a multi-disciplinary team across all relevant departments, the audit encourages a holistic approach to design. Moray Council researched Scotland's Place Standard along with their own urban design guide. The tool details criteria that developers involved in housebuilding and placemaking should reach. Comprising twelve categories under three broad themes of buildings, such as movement and open space/landscaping, Moray Planning Officers carry out the audits in consultation with developers on developments of ten units or more.

2-4 audits are completed every month, with each typically taking 1-2 hours. Early engagement is encouraged. It is free to use and criteria are arranged

according to a red, amber and green rating (with green being the highest attainment level). This system allows planners and developers to find the measures needed to reach high-quality development.

Outcomes

Following the adoption of the Quality Audit, Principal Planning Officer Eily Webster describes the results: "Generally, we've seen much better connections created within developments, particularly in the surrounding areas around the new housing. In terms of the location of our open space, this has developed as a central feature rather than being tucked away and the open space is shared between private and public housing. Improvements in open space and its connectivity is creating safer and healthier physical environments."

"Parking issues were improved... We moved away from parking to the front of the house and located this to the side and rear."



“Improvements in open space and its connectivity are creating safer and healthier physical environments.”

Eily Webster, Principal Planning Officer at Moray Council.

Challenges

“In general, we’re seeing changes coming through but not as much as we would like. We don’t feel that we’re quite there yet in terms of character and identity for volume housebuilding. In areas such as unified palette of materials, street structure and planting hierarchy, there is still work to be done. We’re moving this forward with an updated Quality Audit tool in the new plan.”

Going Forward in 2020

“It’s an ongoing process and we are looking at refining the (second iteration of) the Quality Audit:

“Simplify: We want to distil it to as simple a policy as we can to make it as user friendly as possible, so we have

1. Reduced the categories from twelve categories down to nine, as we felt there was some repetition in the original Quality Audit document.
2. We changed the criteria to red and green assessments, dispensing with the amber category. Amber was too easy to achieve and led to tweaks whereas we are looking for fundamental shifts in the design principles.”

“Streamline communication: We always encourage early discussion with developers in advance of the submission of an application to influence the design and convey the requirements of the policy and Quality Audit. Face to face communication aided by the

Quality Audit makes discussing the steps that can be taken to move from red to green much simpler and clearer. We are currently developing further guidance on how to achieve green in the Quality Audit to give developers a greater understanding of the Council’s Placemaking requirements.

“Keep meetings small to achieve the best

results: We have found that when you get more than six people at meetings the outcomes are harder to achieve, focus is lost. A small team led by Planners, allows for clarity and consistency. Meeting face to face in a small group is also the most efficient use of everyone’s time.”

“Moray Local Development Plan 2: Moving forward, Placemaking is the primary policy in the new MLDP 2020 (anticipated for adoption in Summer 2020). This reflects that Placemaking brings together and is key to delivering wider national policies, plans and strategies such as health and well-being and preventative planning. The Quality Audit tool and process was developed from the LDP2015 to consistently assess and clearly convey with developers whether their proposal complies with the Council’s Placemaking policy. Where proposals do not meet the terms of the policy, the measures to achieve this are set out in the Quality Audit.”

Conclusion

The real strength in the auditing process, according to Eily Webster, has been to raise aspirations to deliver better outcomes. While there is still progress to be made, all services are working collaboratively towards that outcome.

Getting everybody from different council departments to sit around the table and hearing everybody’s point of view is invaluable. Generally, we always come out of meetings with an agreed way forward and this approach doesn’t lead to any potential situation where departments can be played off one another looking for different things. Everyone has signed up to the same approach and this presents a very strong front to developers.

The approach also provides support internally as each department feels that it has the support of each other. That’s why people are all committed - there is a sense of working together for the greater good.

I believe that the QA is easily transferable to authorities, both large and small, urban and rural. Moray Council’s second Quality Audit, which has gained full support from NHS Grampian, the Woodland Trust and Scottish National Heritage, is due to come into effect by summer 2020 on the adoption of their new LDP.

Mini Case Study

LIVEPark – Loch Lomond and The Trossachs National Park



This case study shows how a planning authority can influence place quality through local plans and spatial strategies. Loch Lomond & the Trossachs National Park's (LL&TNP) Local Development Plan uses Rural Development Frameworks (RDF) to provide bespoke place-led Supplementary Guidance in key areas of the National Park to set out on how policies will be applied or varied to shape development and think about a tailored and appropriate development strategy for that area. In line with the place principle, this approach encouraged proactive community engagement from landowners and developers to get certainty over what could be accommodated within each RDF area.

Project and Approach

The LL&TNP Performance Framework of 2015-16 advised two areas where Rural Development Frameworks (RDFs) should be used to pilot approaches for guiding and facilitating appropriate development. RDFs highlight development opportunities and constraints and identify where it might be appropriate to vary from National Park wide criteria-based policies on housing, tourism or economic development in the countryside – either to be more restrictive or more flexible. The approach helped the coordination and delivery of sustainable development in local circumstances.

LL&TNP held consultations with communities, landowners and businesses. Here, they found a shared desire to broaden a spatial dimension to the area planning and to coordinate development in the area more cohesively. Others requested detailed

guidance on what appropriate development might be, and areas where development may be acceptable.

Process

“The process for the two areas (West Loch Lomondside and Buchanan South) was different as local circumstances differed. In West Loch Lomondside (between Inverbeg and Balloch including Luss) the main landowner, Luss Estates, had already started a process of looking at all their land holdings and held their own community and stakeholder workshops led by their appointed architect, Page | Park Architects.

Luss Estates were seeking to address the issues in the area: the ageing demographic, the car parking, limited and poor quality retail offering and threatened closure of the village school so that the village could become a sustainable thriving place.’



Top: Map of the Buchanan South RDF boundary, **Middle:** Balmaha Strategic Principles Map, **Bottom:** A sketch of a smaller group of housing units from Buchanan South RDF. (Credit: Loch Lomond and Trossachs National Park).

“It is clear to see the impact on development that the Frameworks are making.”

Derek Manson, Development Planner, Loch Lomond and the Trossachs National Park

the Park Authority, the council and Luss Estates. In the second workshop, proposals were presented to gain views and there was the same attendance... we could then develop a Rural Development Framework to provide guidance that had statutory status and could be taken into consideration during decision making.” An appointed planner and architect held two workshops in the Buchanan area: “The two-hour workshops, organised and led by the Park Authority, included members of the community but also representatives from Montrose estates as a main landowner, Rural Stirling Housing Association and the community council. The current development proposals and other aspirations were discussed in the first half of the workshop followed by discussions of how the area could change/develop in the next five to ten years... Following the workshops, a headline paper was produced by the consultant, finalising their guidance before formal consultation.”

Rural Development Frameworks

The RDFs (both published in June 2017) are now part of the Local Development Plan and adopted as Statutory Supplementary Guidance. The frameworks create certainty for landowners, investors and communities on the types of development that could be accommodated.

The RDFs feature a map that illustrates the area covered by the guidance, highlighting the special

characteristics to be protected and/or enhanced as part of the design of any development proposal. The Frameworks show proposals for partnerships to work together on developments. With this, the framework shows where small windfall development and conversion opportunities would fall below the size threshold for an identified development opportunity in the Local Development Plan.

Impact

Since the adoption of the RDFs there has been a greater co-ordinated approach between all stakeholders taken in the delivery of sustainable rural development proposals within each of the two Rural Development Frameworks.

West Loch Lomond

A better relationship has been created with the estate and has aligned many of their aspirations with those of the community, the Park and other stakeholders such as the council.

In Luss, many applications have been submitted and have been or are being processed for affordable housing in a mixture of locations, as well as for a village green, retail units, and a new car park. So far, five affordable homes have been developed on the ground as part of this package of proposals.

Buchanan South

The community council has referred to and has used the document when commenting on planning applications as they feel that they are in a strong position to accurately represent the views of local residents.

Affordable housing has been approved at allocated sites and work on the cycle/pedestrian connection between Drymen and Balmaha is partially completed. It has also helped deal with infill development pressures in Buchanan estate where the framework has clear guidance as to what is appropriate.



Bottom: Front cover of the West Loch Lomondside RDF showing a Loch Lomond sightline (Credit: Loch Lomond and Trossachs National Park).

Transferability of approach using RDF's

Rural Development Frameworks could be applied in other rural areas to help communities, businesses and landowners develop a shared vision for an area. The RDF model suggests an approach to develop Place Plans.

Positive feedback on RDF's hails the increased certainty they provide to landowners and communities on the types of proposals that would be supported. It helped the communities feel less vulnerable to ad-hoc development proposals coming forward that would have been assessed against criteria-based policies in the Local Development Plan.

"Having detailed frameworks for an area helps achieve an agreed overall development strategy for the area whilst key assets are protected."

Conclusion

"We consider this approach could be widely used in other rural authorities which face similar pressures and encouraging their use will help deliver development that is place-based and will deliver multiple benefits to the local economy, community and natural heritage."

The Place Principle

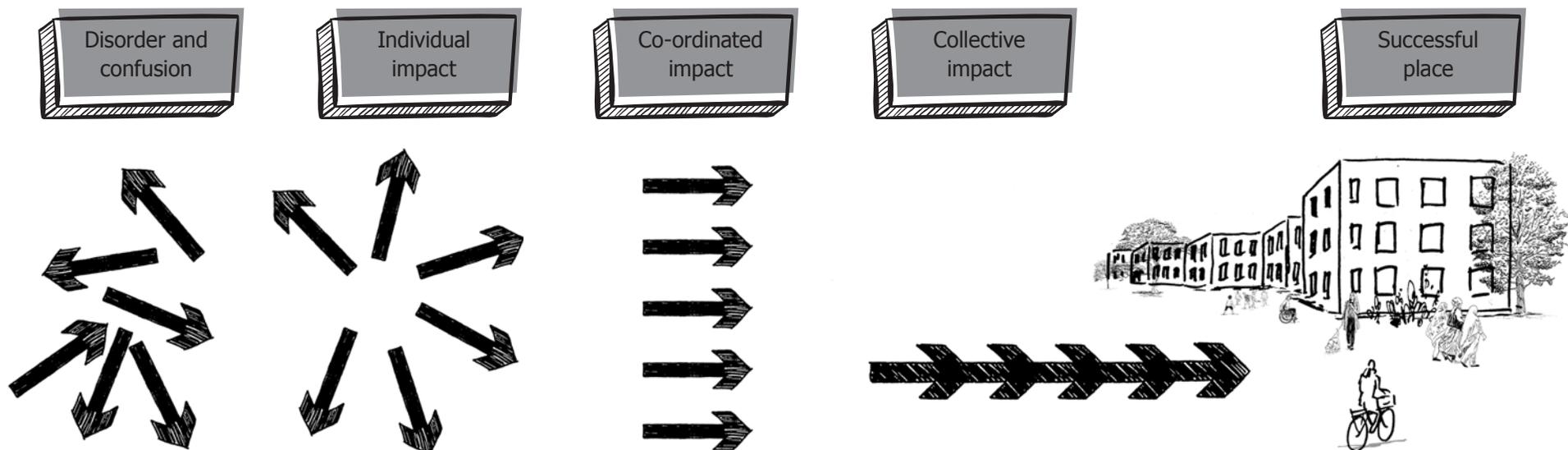
- **We recognise that:**
Place is where people, location and resources combine to create a sense of identity and purpose, and is at the heart of addressing the needs and realising the full potential of communities. Places are shaped by the way resources, services and assets are directed and used by the people who live in and invest in them.

A more joined-up, collaborative, and participative approach to services, land and buildings, across all sectors within a place, enables better outcomes for everyone and increased opportunities for people and communities to shape their own lives.

- **The principle requests that:**
all those responsible for providing services and looking after assets in a place need to work and plan together, and with local communities, to improve the lives of people, support inclusive and sustainable economic growth and create more successful places.
- **We commit to talking:**
a collaborative, place-based approach with a shared purpose to support a clear way forward for all services, assets and investments which will maximise the impact of their combined resources.

[Click here for the Place Principle](#)

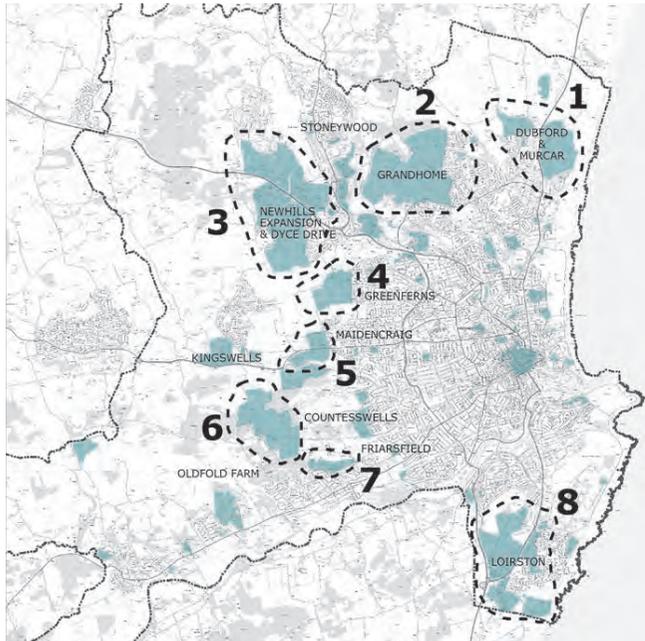
bottom: Place Principle illustration



How to.. Communicate With Graphics

Good graphic communication can support a place based approach. Successful graphics have a clear purpose and communicate relevant information about a story of change at a whole place, local area or priority site level. The following examples demonstrate elements of place-based, collaborative approaches from the UK and further afield.

Aberdeen



Countesswells

Countesswells

2.23 A new community at Countesswells was identified in the 2012 Local Development Plan. This area benefits from being close to the employment sites at Kingswells. This development includes 10ha of employment land plus appropriate community facilities.



Countesswells New Community Site

Table 6: Development at Countesswells

Sites	Local Development Plan Period		
	Existing to 2016	Phase 1: 2017 - 2026	Phase 2: 2027 - 2035
OP38 Countesswells	2,150	850	-
	10 hectares employment		
Housing Total	2,150 homes	850 homes	
Employment Land Total	10 hectares		

Notes

- Development Framework and Phase 1 Masterplan prepared for OP38 Countesswells.



Illustration from the Countesswells Development Framework Phase 1 Masterplan courtesy of Optimised Environments Ltd

18 Aberdeen Local Development Plan: 2017

City of Edinburgh

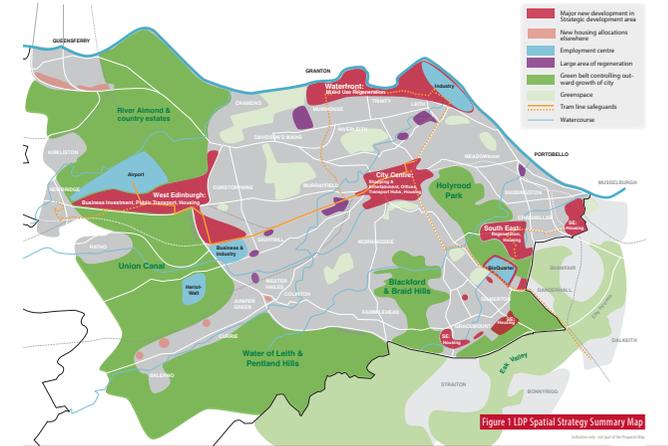


Figure 1 LDP Spatial Strategy Summary Map

Edinburgh: LDP Map November 2016
Figure 12, Waterfront Overview Map

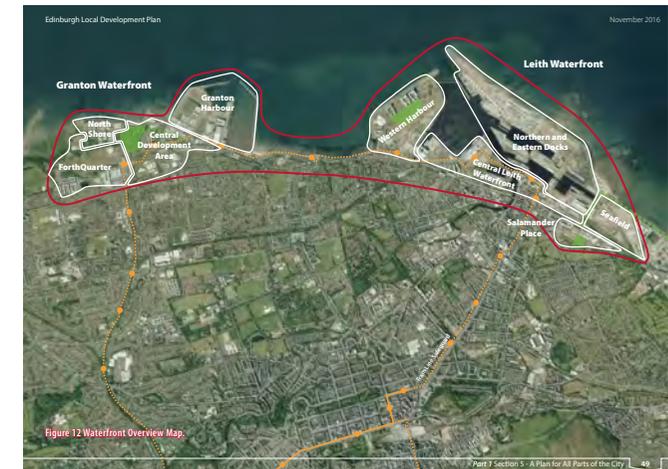


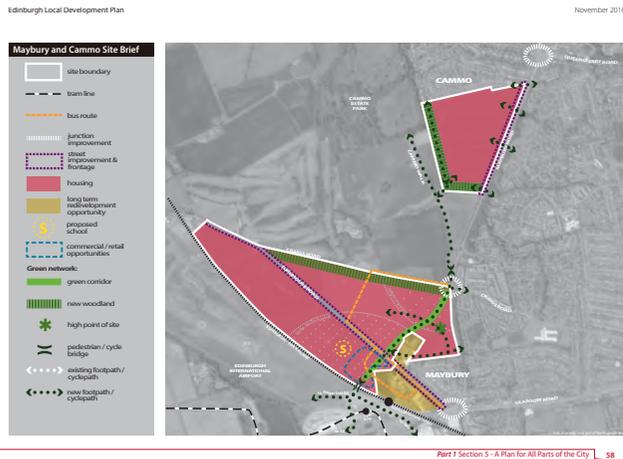
Figure 12 Waterfront Overview Map

Part 3 Section 5 - A Plan for All Parts of the City 49

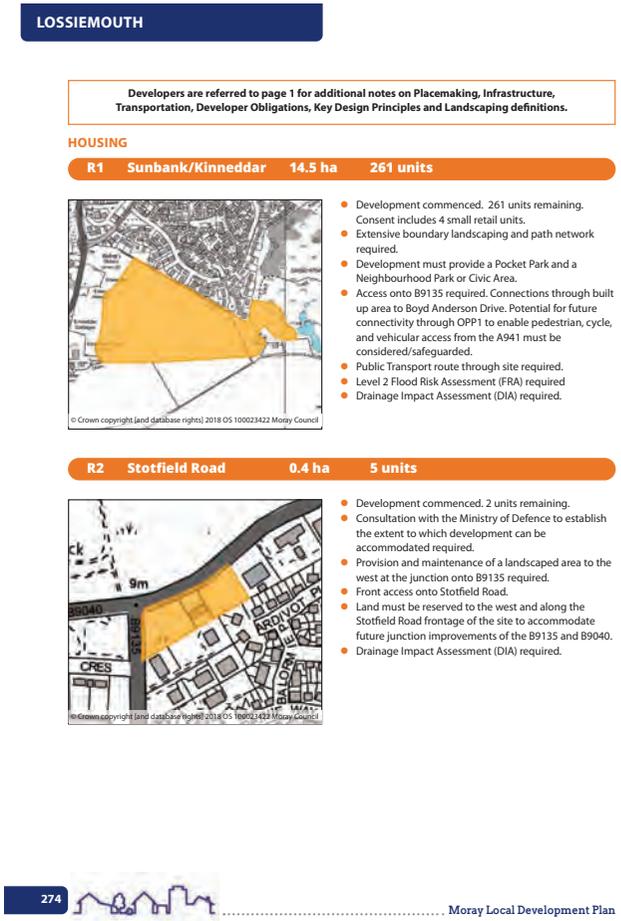
- ▲ Top Left: Aberdeen City - Strategic Illustration of Aberdeen Masterplan Zones and Area Visualisation.
- ▶ Middle: Illustrations at strategy and local area level.
- ▶ Right: City of Edinburgh Council - Spatial Strategy, Priority Area and Local Place Briefs for allocated sites.

How to.. Communicate With Graphics

City of Edinburgh



Moray

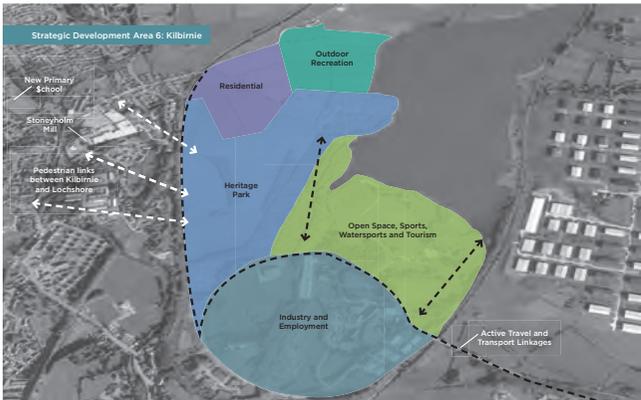


- Top Left: City of Edinburgh Council - Spatial Strategy, Priority Area and Local Place Briefs for allocated sites.
- Middle: Moray LDP Settlement Statements and strategic briefs for priority sites.
- Right: Strategic, priority area and site allocation diagrams using a range of maps, photography and diagrams.

How to... Communicate With Graphics

North Ayrshire

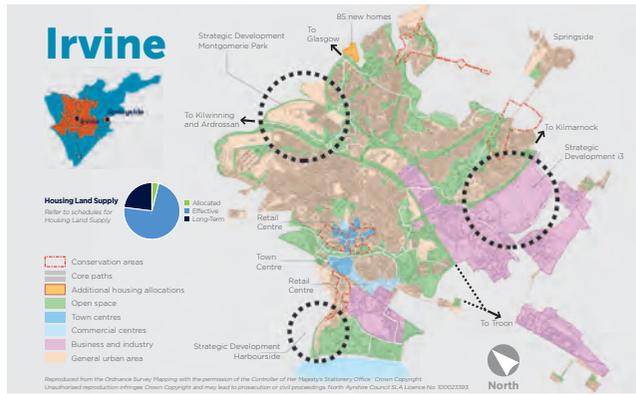
Local Development Plan | Your Plan Your Future



© Get Mapping plc

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Local Development Plan | Your Plan Your Future



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Strategic Policy 4: Delivering on Community Priorities



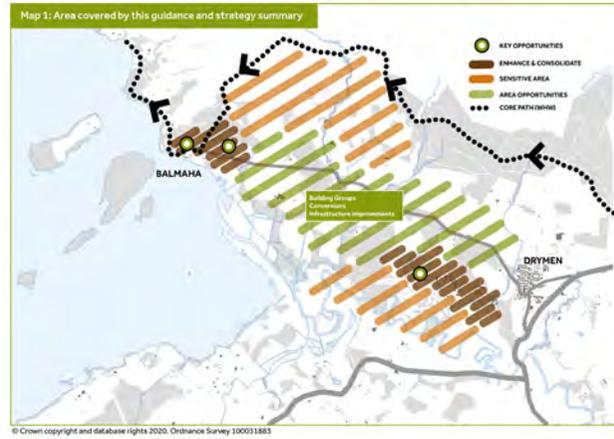
41

▲ Top Left: North Ayrshire LDP, Strategic Growth Areas, Priority Place Briefs, infographic data.

▶ Middle: Use of photography and infographics for data, strategic briefs and allocated sites.

How to.. Communicate With Graphics

Loch Lomond and Trossachs National Park



<p>SINGLE PROPERTY – ON THE APPROACHES TO BALMAHA In this example properties follow the existing development pattern and integrate into the existing setting. They have:</p> <ul style="list-style-type: none"> • consistent boundary walls • planting retained and new planting • consistent spacing between houses • new property is orientated in a similar way to existing houses • existing building typology, massing and scale informs new building design <p>PRECEDENT</p> <p>Durness: contemporary timber cottage Balmaha: typical village property</p>	<p>SMALLER GROUP A limited number of units (3-4) can be grouped together informally to form a rural courtyard type space</p> <ul style="list-style-type: none"> • new development is built behind existing property • consistent setback and boundary is retained at street frontage • original access is retained • planting is retained • characterful shared space is created <p>PRECEDENT</p> <p>Balmaha: new backland development</p>	<p>LARGER GROUPING A limited number of units (6-8) can be developed whilst still retaining the rural character of Balmaha</p> <ul style="list-style-type: none"> • new development maintains existing setbacks, landscaping and boundary treatment of the area • massing and density is similar to existing development • alternate orientation of properties allows for rural courtyard arrangement • parking is well integrated • good quality boundary treatment between properties defines shared central space and private garden areas <p>PRECEDENT</p> <p>Applecross: contemporary courtyard development</p>
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14 BUCHANAN SOUTH SUPPLEMENTARY GUIDANCE ● LIVE PARK

◀ Left: LL&TNP illustrations for vision, Area Development Framework Diagrams, Balmaha Strategic Principles and development form illustrations.

◀ Middle: Illustrations at vision, priority and local area level using mix of photography, maps, diagrams and illustrations to clearly convey key information.

How to... Communicate With Graphics

Croydon South, Melbourne

Creating a city of 20-minute neighbourhoods

Neighbourhoods are the foundation of our city — they are the places we live, connect and build communities.

Plan Melbourne 2017-2050 is a long-term plan to accommodate Melbourne's future growth in population.

The 20-minute neighbourhood concept is a key principle of the strategy. The 20-minute neighbourhood is all about 'living locally' — giving people the ability to meet most of their everyday needs within a 20-minute walk from home, with access to safe cycling and local public transport options.

Research shows that 20-minutes is the maximum time people are willing to walk to meet their daily needs locally!

These needs include local health facilities and services, schools and local shopping centres. This represents an 800m walk from home to a service or destination, and back again.

This distance is a guide as there are many factors that influence people's ability or willingness to walk.

To make Croydon South a more liveable place, people should have access to the 20-minute neighbourhood features within 800 metres from home.



Figure 1 Features of a 20-minute neighbourhood
Source: Department of Environment, Land, Water and Planning

2 Technical assessments

To support a whole-of-government evidence-based approach to the project, DELWP facilitated the preparation of technical assessments for Croydon South. This included transport, housing, health and vegetation assessments.

Healthy Active by Design

The Heart Foundation works to improve heart disease prevention and care. A key way to achieve this is through improved physical activity by promoting walking, cycling and other forms of physical activity. Work undertaken by the Heart Foundation aligns closely with the aims of 20-minute neighbourhoods, in particular the Healthy Active by Design guidelines, which were developed as practical guide to address the need to create healthy neighbourhoods.

These guidelines were used to inform the delivery of the program and were adapted into a 20-Minute Neighbourhood Scorecard, which was used to identify opportunities in Step 3: Future opportunities. This simplified scorecard will be adapted into a useful tool for other councils.

For more information on the healthy active by design guidelines visit [here](#)

Walkability assessment

Victoria Walks is an independent health organisation that advocates for safe, accessible and connected environments that encourages walking.

In June 2018, Victoria Walks conducted an on-site walking assessment of Croydon South to identify pedestrian infrastructure issues.

The assessment provided preliminary recommendations to:

- Construct a pedestrian crossing on Eastfield Road.
- Reduce speed limits around Eastfield Shops.
- Improve wayfinding signage.
- Explore opportunities to naturalise the Tarralla Creek.
- Install raised zebra crossings at intersections.

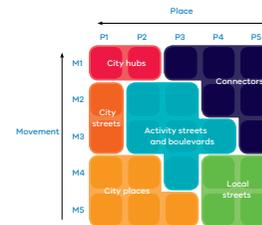
To see the full walkability assessment visit [here](#)

Movement and Place assessment

Movement and Place is a new Department of Transport road-management framework for Victoria. It recognises the role streets play not only in moving people and goods, but also in contributing to the places where people live, work and play. It integrates planning and transport and it will be used as a framework to support transport decision-making.

An assessment was undertaken for Croydon South, which was one of the first times the new framework was tested at a local level. Based on this assessment the following design objectives were identified for Croydon South:

- Pedestrian-safety upgrade at the intersection of Bayswater and Eastfield roads.
- Road-safety upgrade along Bayswater and Eastfield roads.
- Improvements to cycling infrastructure on Dorset Road and Patterson Street.



For information on the methodology, visit [here](#)

Housing development assessment

Housing development data provided information on the number and location of existing dwellings, vacant residential land, and recent residential development across all land in Victoria.

Housing stock in Croydon South is characterised by single detached dwellings. While there has been an increase in unit developments in recent years, the area is generally considered low density with 17 dwellings per hectare.

Research shows that a minimum housing density of 25 dwellings per hectare is needed to deliver inclusive, vibrant and healthy neighbourhoods.²

Facilitate an increased percentage of new housing in established areas to create a city of 20-minute neighbourhoods close to existing services, jobs and public transport.
POLICY 2.1.2. PLAN MELBOURNE

Vegetation and heat vulnerability assessment

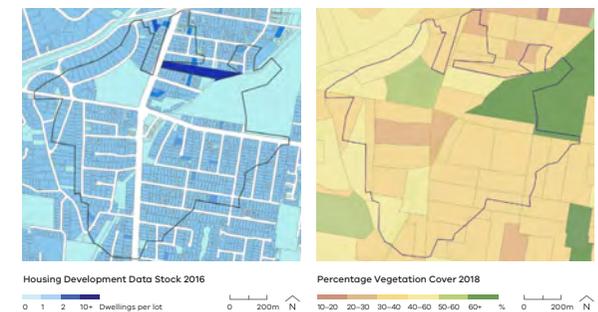
The urban heat-island effect is created by the built environment absorbing, trapping and, in some cases, directly emitting heat. This effect can cause the built environment to be up to four degrees Celsius hotter than surrounding non-urban areas.³

Increasing the vegetation cover and greening the city can provide cooling benefits and improve the community's resilience to extreme heatwaves. Urban greening and street trees remove pollution, an increase in tree cover by 10%, can reduce energy needed for heating and cooling by 5 to 10%.⁴ Greenery can improve shade for walking and generally improve the public realm of neighbourhoods.

While vegetation mapping shows moderate to high canopy cover for most of Croydon South (more than 50%), there are some areas with low canopy cover (less than 30%). These areas include Eastfield Shops and industrial areas to the north.

To minimise heat vulnerability associated with low canopy cover, continued protection of existing vegetation is required. Future investment is also needed to increase support for an urban forest.

Support a cooler Melbourne by greening urban areas, buildings, transport corridors and open spaces to create an urban forest
POLICY 6.4.1. PLAN MELBOURNE



- ▲ Left: 20 Minute Neighborhood Policy.
- ▶ Middle: Croydon South 20 Minute Neighborhood Technical Assessments.
- ▶ Right: Priority Area Technical Assessment Summaries.

How to... Communicate With Graphics

Croydon South, Melbourne

3 Croydon South future opportunities

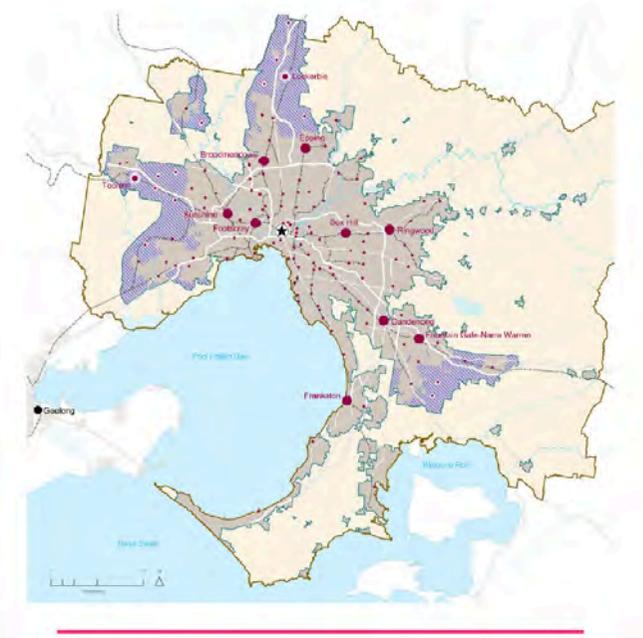
This section brings all the work on the pilot together, it draws on the community partnership feedback, workshops and technical assessments.

The 20-minute neighbourhood features (see figure 1) informed the three steps of the pilot program. The features have been used as the basis for a range of opportunities to improve liveability and support people to live locally in Croydon South.

The following opportunities reflect community ideas that will be a starting point in a local approach to delivering a 20-minute neighbourhood in Croydon South. These opportunities reflect community feedback and technical assessments. They are not formal funding commitments.



Melbourne, Australia



- Left: Croydon South 20 minute neighborhood plans. Simple graphics that summarise technical, community and partnership opportunities in a priority area around a vision for a 20 minute neighborhood.
- Above: Plan Melbourne Housing Strategy.

How to... Communicate With Graphics

Tower Hamlets, London

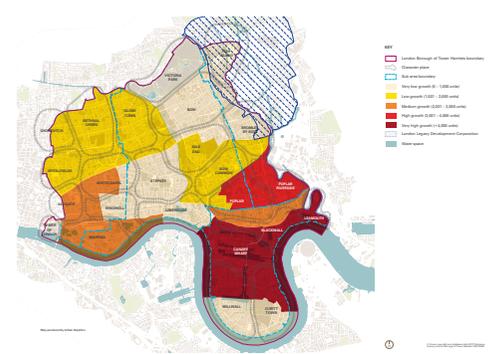
SECTION 2: VISION AND OBJECTIVES

Figure 5: The key diagram



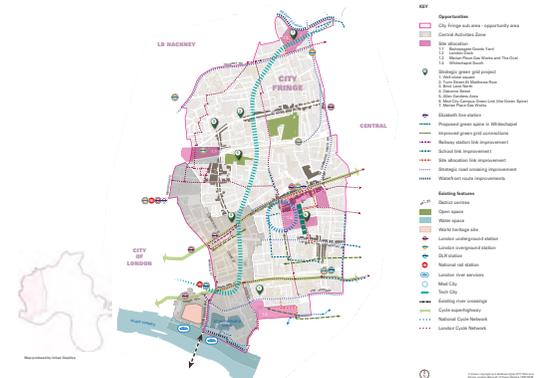
SECTION 3: POLICIES

Figure 9: Housing distribution across 24 places



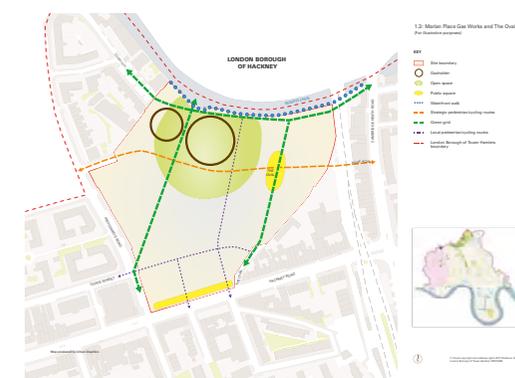
SECTION 4: DELIVERING SUSTAINABLE PLACES

Figure 20: Vision for City Fringe



SECTION 4: DELIVERING SUSTAINABLE PLACES

Figure 24: Marian Place Gas Works and The Oval



◀ Left and Middle: Tower Hamlets Local Development Plan - Illustrations at vision, priority and local area level using mix of photography, maps, diagrams and illustrations to clearly convey key information.

How to... Select the Right Design Tool

Design Tools can be used to influence the quality of projects, enabling and facilitating positive change. They can provide a structure for stakeholders to contribute to the creation of thriving, resilient and just places. Whichever tools are selected for the task they should focus on delivering the approach of the Place Principle and the outcomes of the National Performance Framework.

The following tools could be used to inform the preparation of Local Development Plans (LDP's) or Strategic Housing Investment Plans (SHIPS), to make recommendations about which approaches to recommend for key sites. Identifying the most suitable tool for use at the correct time, is crucial to the success of a project

Irrespective of which tool is selected, a collaborative approach to briefing with development partners and communities will support shared ownership and deliverability of an overall vision and priorities. Strong place leadership is needed to steer design and place quality through briefing, design development and delivery of whichever approach is chosen.

How To Select The Right Design Tool



How to... Select The Right Design Tool



Design Frameworks

- Set out strategic design principles to 'guide' transformation across larger geographical areas of significant change.
- Address major issues in a coordinated and viable way.
- Can include maps and diagrams to show importance of connections within and around a place.
- Used as a material consideration in the determination of planning applications
- Good to coordinate action over broad areas facing significant change, where only elements of are likely to be developed in the near future.
- Can help coordinate more detailed development briefs and masterplans, in accordance with principles set out by the framework
- Can be used for areas such as urban quarters, regeneration areas, town centres, urban edges, conservation areas, villages and new settlements.
- Typically prepared by external consultants acting for local authorities.

Development Briefs

- Set out how places should change and the policies that apply to decisions on proposals for sites where principle of development is established by the local development plan.
- Form the basis of dialogue between a local authority and developers by setting out design standards for future development.
- Good for providing site specific guidance on how significant or sensitive sites should be developed in line with the relevant planning and design policies.
- Incorporate indicative diagrams without design detail. May include requirements on function, layout, plot sizes, building heights and line and materials.
- Useful for sites identified as development priorities or those on which development is likely to have a significant impact.
- Typically prepared by local authorities as a policy tool directed towards developers once a site has been allocated for development.

Masterplan Consent Areas

- A defined area where the need for planning permission is removed for certain types of development, where development complies with conditions set out in a Masterplan Consent Area scheme.
- Developers submit detailed designs which demonstrate proposals are compliant with design conditions outlined for the area.
- Potential to influence for good design and place quality where careful consideration is given to up front to establishing necessary design parameters and conditions through masterplans / design codes. Can offer flexibility while maintaining high design standards.
- Enforcement action can be taken where developments breach area conditions.
- Prepared by local authorities, potentially with design input from consultants, as a policy tool directed towards future developers.
- More guidance to follow from SGov on implementation of this tool which replaces Simplified Planning Zones.

Masterplans

- Based on an understanding of place, masterplans provide a framework for development from strategic, to site level. Generally applied where there is a degree of certainty about development of a specific site. Link place, social and economic analysis to design proposals and a delivery strategy.
- Set out an overall development concept, including present and future land use, urban design, landscaping, built form, infrastructure, circulation and service provision.
- Establish process to deliver design proposals, setting out partnerships, costs, phasing, timing and stewardship.
- A collaborative approach to briefing and delivery - by or on behalf those who own or control the development process - can help drive design and place quality.
- Typically used for larger sites within or on the edge of settlements, or smaller sites in sensitive locations.
- Typically prepared by consultants acting for local authorities or via a partnership approach between local authority and a lead developer.

Design Codes or Parameters

- Valuable tool to respond to policy and promote better outcomes by investing resources upfront to streamline later processes and influence delivery.
- Can establish and maintain a strong vision and steer design and place quality through delivery phases.
- Most valuable where sites are large, in multiple ownership and where development involves more than one developer over time.
- Typically, a relatively prescriptive document, read in conjunction with a masterplan that sets the overall vision for development. Can range from highly prescriptive to more abstract according to level of control and risk development partners share. Text and graphics set out mandatory elements of development form and detail ranging from frontage lines or building scale to materials palettes.
- Strong adherence is vital from outset to set a benchmark for future phases. Consideration of how to protect delivery of place objectives is needed where control is delegated through sale of plots.
- Typically prepared by consultants acting for local authorities or via a partnership approach between local authority and a lead developer.

Design Guides

- Typically, a form of supplementary guidance to support assessment of proposals requiring planning and roads construction consent.
- Set out expectations for design in line with local and national planning policy.
- Provide guidance on how development can be carried out in accordance with national policy or the development plan and might be used to provide topic specific guidance on for example development in conservation areas, or application of designing streets in a local context.
- Provide a less prescriptive form of control document, also typically read in conjunction with a masterplan. Can also be stand alone, for example demonstrating intent for town centre improvements.
- Tend towards being illustrative of intent rather than mandatory in it's level of control.
- Typically prepared by consultants acting for local authorities or via a partnership approach between local authority and a lead developer.

Design Statements

- A design statement provided by applicants should concisely explain and illustrate the design principles and design concept in the terms of the proposed layout; landscape; scale and mix; details and materials; and maintenance. Can support consideration of how well a proposal helps to achieve place quality.
- A useful tool with benefits for applicants and local authorities. Can provide a sound basis for constructive discussions and negotiations to support quality development.
- More relevant where there is no masterplan to explain design thinking.
- Typically prepared by consultants acting for developers, in support of a planning applications. Submission enables applicant to set out the extent of analysis and quality of thought behind a proposal.

How to... Select The Right Skills

The following sources offer helpful examples of skills relevant to supporting a place-based approach:

Skills for Place Leadership

Skills and talents for place leadership:

- Articulate the long-term vision and direction for creating a place of real quality.
- Motivate, inspire and persuade people to sign up to that vision.
- Listen to, and communicate with, people across and beyond the delivery organisation.
- Recruit the right team for the project, including consultants and contractors
- Cope with change and handle crises decisively.
- Remain focused on the vision and avoid the temptation to be distracted, even derailed, by short-term concerns for quantitative outputs or pressure from vested, sectional interests.
- Maintain the vision through taxing processes and regulations.
- Drive project delivery and stick to a timetable.

[Delivering Better Places in Scotland](#)

Skills for Sustainable Communities

Sustainable Community skills relevant to a successful place based approach:

Skills: Inclusive Visioning, Project Management, Leadership, Breakthrough thinking / brokerage, Teams/partnership working within and between teams based on a shared sense of purpose, Making it happen given constraints, Process management / change management, Financial management and appraisal, Stakeholder management, Analysis, decision making, learning from mistakes and evaluation.

Behaviours:

Thinking: Creativity, Strategic, Open to change, Awareness of limitation, Challenging Assumptions, Flexible, Clear, Decisive, Respect for and Awareness of contributions of other professionals.

Acting: Entrepreneurial, Can-do Mentality, Co-operation, Able to seek help, Humility, Committed to making it happen, Respect for diversity and Equal Opportunity, Able to take action, Having a shared sense of purpose.

Sourced from the [Egan Review](#)

Future Workforce Skills

Future workshop skills suggesting team qualities that can support a successful place-based approach.

Appendix 2: Meta-skills model expanded

Skills for the future: Meta-skills

Timeless, higher order skills that support the development of additional skills and promote success in whatever context the future brings

<p>Self management Taking responsibility for your own behaviour and wellbeing</p>	<p>Social intelligence Awareness of others' feelings, needs, and concerns in order to effectively navigate and negotiate complex social relationships and environments</p>	<p>Innovation The ability to define and create significant positive change</p>
<p>Focussing The ability to manage cognitive load by filtering and sorting information in order to maintain a sense of focus in an age of information overload and constant change</p> <ul style="list-style-type: none"> — Sorting — Attention — Filtering 	<p>Communicating The ability to openly and honestly share information in a way that creates mutual understanding about others' thoughts, intentions and ideas</p> <ul style="list-style-type: none"> — Receiving information — Listening — Giving information — Storytelling 	<p>Curiosity The desire to know or learn something in order to inspire new ideas and concepts</p> <ul style="list-style-type: none"> — Observation — Questioning — Information sourcing — Problem recognition
<p>Integrity Acting in an honest and consistent manner based on a strong sense of self and personal values</p> <ul style="list-style-type: none"> — Self awareness — Ethics — Self control 	<p>Feeling Considering impact on other people by being able to take a range of different thoughts, feelings and perspectives into account</p> <ul style="list-style-type: none"> — Empathy — Social conscience 	<p>Creativity The ability to imagine and think of new ways of addressing problems, answering questions or expressing meaning</p> <ul style="list-style-type: none"> — Imagination — Idea generation — Visualising — Maker mentality
<p>Adopting The ability and interest to continue to enlarge knowledge, understanding and skills in order to remain adaptive and resilient as circumstances change</p> <ul style="list-style-type: none"> — Openness — Critical reflection — Adaptability — Self-learning — Resilience 	<p>Collaborating The ability to work in coordination with others to convey information and tackle problems</p> <ul style="list-style-type: none"> — Relationship building — Teamworking & collaboration — Social perceptiveness — Global & cross-cultural competence 	<p>Sense making The ability to determine the deeper meaning or significance of what is being expressed and to recognise wider themes and patterns in information</p> <ul style="list-style-type: none"> — Pattern recognition — Holistic thinking — Synthesis — Opportunity recognition — Analysis
<p>Initiative Readiness to get started and act on opportunities built on a foundation of self belief</p> <ul style="list-style-type: none"> — Courage — Independent thinking — Risk taking — Decision making — Self belief — Self motivation — Responsibility — Enterprising 	<p>Leading The ability to lead others by inspiring them with a clear vision and motivating them to realise this</p> <ul style="list-style-type: none"> — Inspiring others — Influencing — Motivating others — Developing others — Change catalyst 	<p>Critical thinking The ability to evaluate and draw conclusions from information in order to solve complex problems and make decisions</p> <ul style="list-style-type: none"> — Deconstruction — Logical thinking — Judgement — Computational thinking

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▲ Above: [Skills 4.0, A Skills Module to Drive Scotland's Future, p26](#)

How to... Structure an Action Plan

Components of Action Plan

The following is not an exhaustive list, but an indication of what could be included in an Action Plan.

Action Plan Components

a) **Area context and definition of the vision for change:**

Summary stats for the place.

b) **Focus and objectives for growth or change Presentation of strategic goal or vision:**

Information on why this is area key priority Overall vision for change.

c) **Actions / schedule to deliver:**

Possible content:

- Breakdown of planned activities / actions / projects within the area which will be developed and delivered to help meet these objectives and achieve results
- Information on when these activities will be delivered
- Gantt chart showing actions and timetable

d) **Funding:**

Possible content:

- Summary of resources which will be required to make this happen
- Summary of potential sources of funding

e) **Framework for delivery including partnerships:**

Possible content:

- Information on who will deliver actions – roles and responsibilities of partners.
- Information on governance during and after delivery.
- Summary of indicators or milestones which will be used to monitor progress.

f) **Description of the process:**

Possible content:

- Composition and role of the partners at key phases

g) **Risk analysis:**

- Consider risks like reputation impact, loss of autonomy, conflicts of interest, resources, implementation challenges
- Are you comfortable that the level of risk is acceptable.

Action Plan Structure Based on URBACT Local Action Plans from the [URBACT Toolkit for participative projects that promote sustainable urban development](#).

How to... Structure a Partnership Agreement

Components of a Partnership Agreement - Where collaborative workshops have identified partnerships that will help to deliver change, then consider a partnership agreement can help in clarifying who will do what and when to deliver the vision and objectives for priority area. The following structure is a helpful basis for such an agreement, drawn from a [NESTAs Partnership Toolkit](#): section 3, P7

1.0 Partner Organisations - Details of each key person in each party:

Partner A -

Name and contact details.

- Name, Job Title, Business Address

Partner B -

Name and contact details.

- Name, Job Title, Business Address
- Add more if there are more than two partners involved

2.0 Statement of Intent - Taking time to establish a shared vision early will help steer the partnership and including this in your partnership agreement will help flush out any misalignment.

We, the undersigned, acknowledge a common commitment to/concern.

- What is the social problem that you are aiming to address?
- What is your overarching vision for this partnership?
- What are the values that you wish to place around the partnership (e.g. trust, transparency)?

By working together as partners, we see the added value each of us can bring to fulfil this commitment/address this concern.

Specifically we expect each partner to contribute to the project in the following way(s):

Partner A -

Partner B -

All Partners -

- What is being contributed by the two parties? For example money, time, resource, expertise, connections.

3.0 Structures and Procedures - Clear governance will help progress to be made in the partnership, and can also reinforce a true 'partnership' of equals giving both parties equal voice.

Partner roles and responsibilities.

- What are the roles and responsibilities of each party?
- How do you expect trust and respect to be upheld in this partnership? What would go against this? How would you raise concerns?

Coordination and administration.

- Who will coordinate the project?
- How will each party report progress?

Working groups/committees/advisory group(s).

- What governance structure is in place?
- Who is involved?
- What are the terms of reference?

Decision-making processes.

- How will decisions be made and in which forum?
- How will you resolve conflict between the parties?
- Would anyone external be brought in?
- How would a decision be reached?

Accountability arrangements.

- Who is accountable for what? Both individually and Partners.

4.0 Resources - It is important to agree on what each party brings to the table and when.

We will provide the following

specific resources to:

a) The partnership.

b) The project.

- In detail set out the resources to be provided, by which party, including metrics e.g. X days per week of project management.
- Include timelines.
- Include any conditions (e.g. if you do this ... then we will do this).
- If money is involved, include when and how money will be paid and under what terms.

5.0 Audits, Reviews and Revisions - Agree up front how and when you will monitor and review the partnership.

We agree to make available all information relevant to this partnership to partners as necessary.

- Is there anything that will remain confidential? Call it out here.

We agree to review the partnership every ... months.

- How often and in what forum will you review the partnership?

An independent audit of the financial arrangements of the partnership (and any projects resulting from the partnership) will be undertaken on an annual basis.

- Who will source this, and who will pay for it?

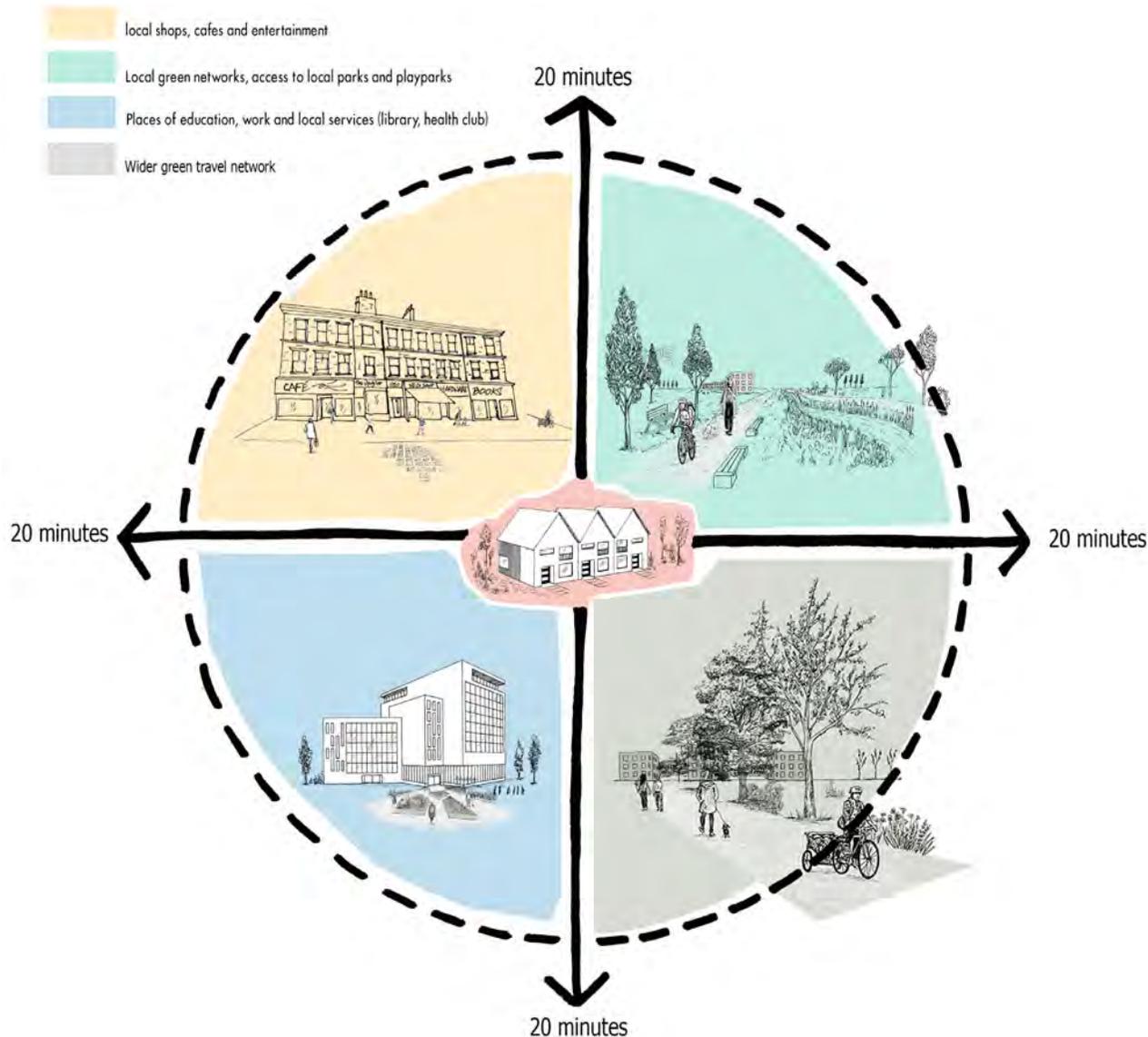
We agree to make adjustments to the partnership (including re-writing this agreement) should either a review or an audit indicate that this is necessary for the partnership to achieve its objectives.

6.0 Caveats - Include any other caveats that you want to add.

This agreement does not permit the use of copyright materials (including logos) or the dissemination of confidential information to any third party without the written permission of the partner(s) concerned.

This agreement does not bind partner organisations or their staff/officers to any financial or other liability without further formal documentation.

20 Minute Neighborhood



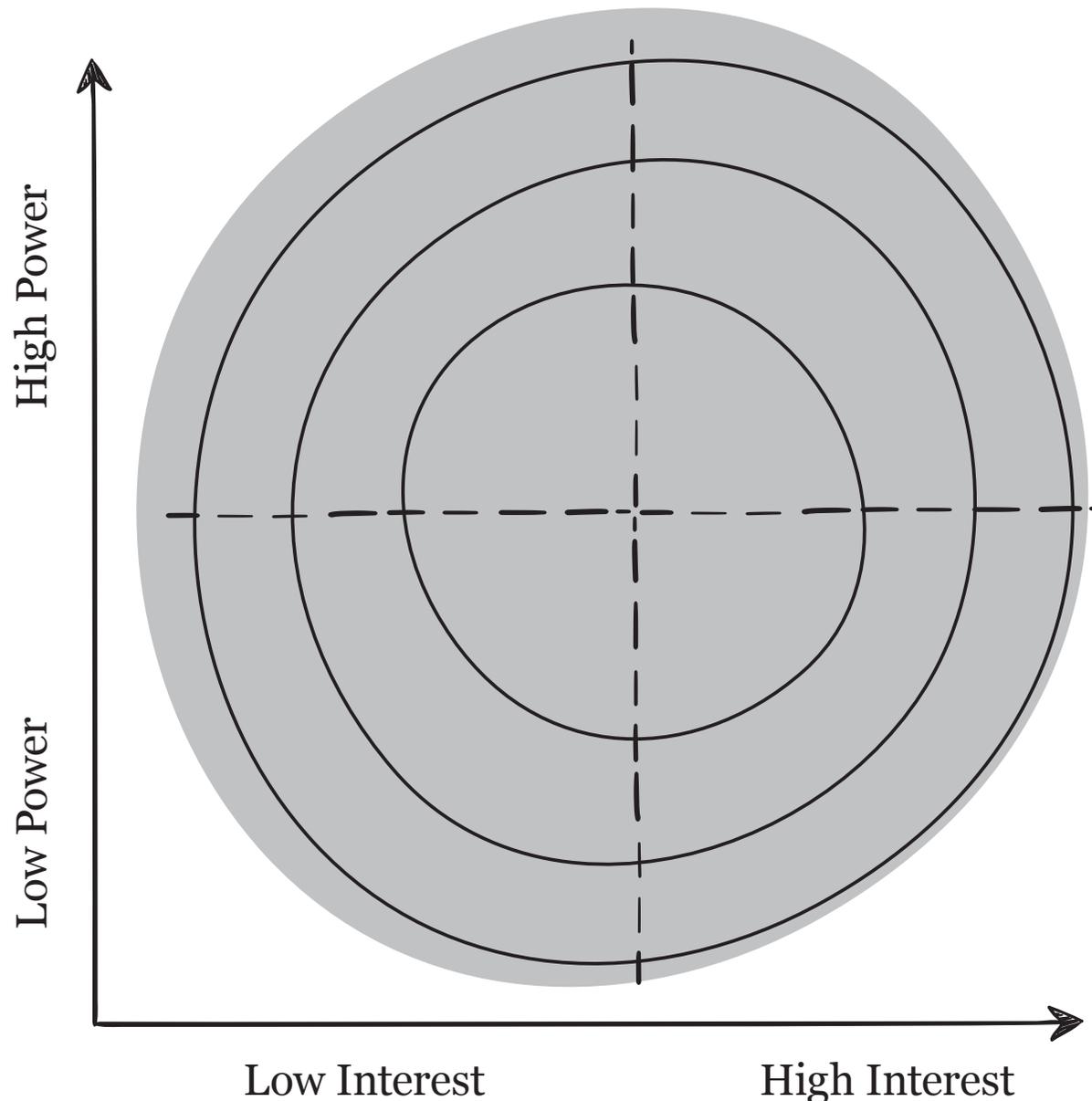
This 20 minute neighbourhood illustration demonstrates the kinds of places and services that would ideally be available within a 20 minute walk from home. It is adapted from Barton et al 1995.

The 20 minute neighbourhood is a helpful guiding principle for successful neighbourhoods. It can be used to inform planning of new places or to map qualities of existing places.

When mapping 20 minute journeys for an existing place it is helpful to consider:

- The need for tailoring application to fit local circumstances. For example, outwith a town or city context, consider how extended networks of small distances can offer access through active travel routes, public transport or alternative models of service provision.
- Gross densities achievable within the local place character.
- Wider catchment populations for certain facilities.
- How permeable or direct pedestrian and cycle routes are.
- The general shape and topography of the town or neighbourhood.
- Siting requirements (some facilities are not locationally flexible).

Audience Prioritisation Template



Audience prioritisation is a quick and simple way to help you prioritise the teams, groups, organisations or individuals with a relationship or involvement to your work.

Prioritisation will help you in planning who you need to involve, engage or keep informed in your place based approach.

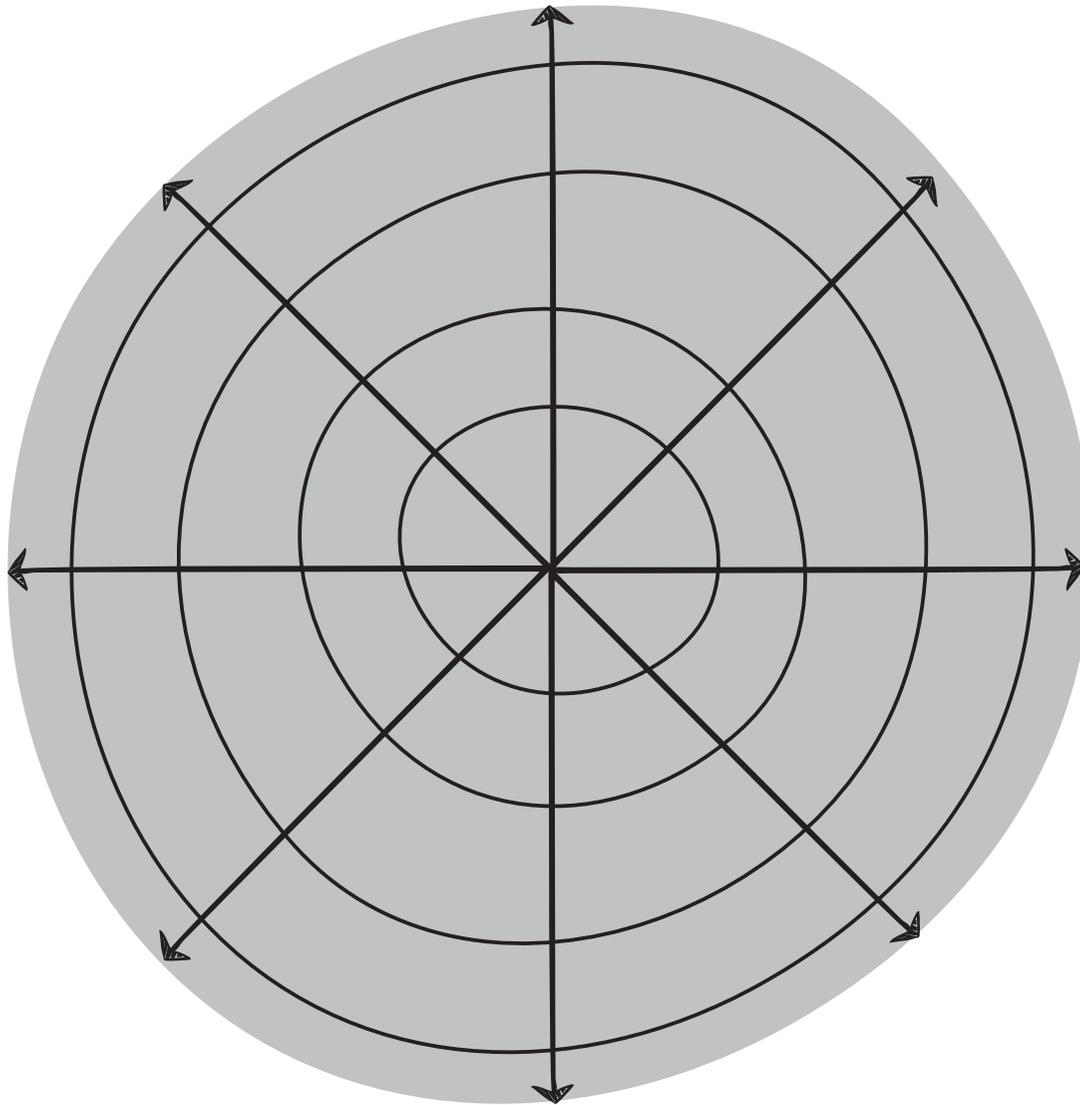
Prioritise the audiences you mapped in step 1 according to their level of interest and influence.

Completing the mapping and prioritisation will help you to develop a clearer picture of who you need to engage and how in taking a place based approach.

Depending on the scale of place you are considering you could choose to complete one overall map, or individual maps for broad groups or sectors.

You can repeat this mapping at later stages to prioritise key audiences for priority places within your area.

Audience Mapping Template



Audience mapping is a quick and simple way to help you visualise the teams, groups, organisations or individuals with a relationship or involvement to your work.

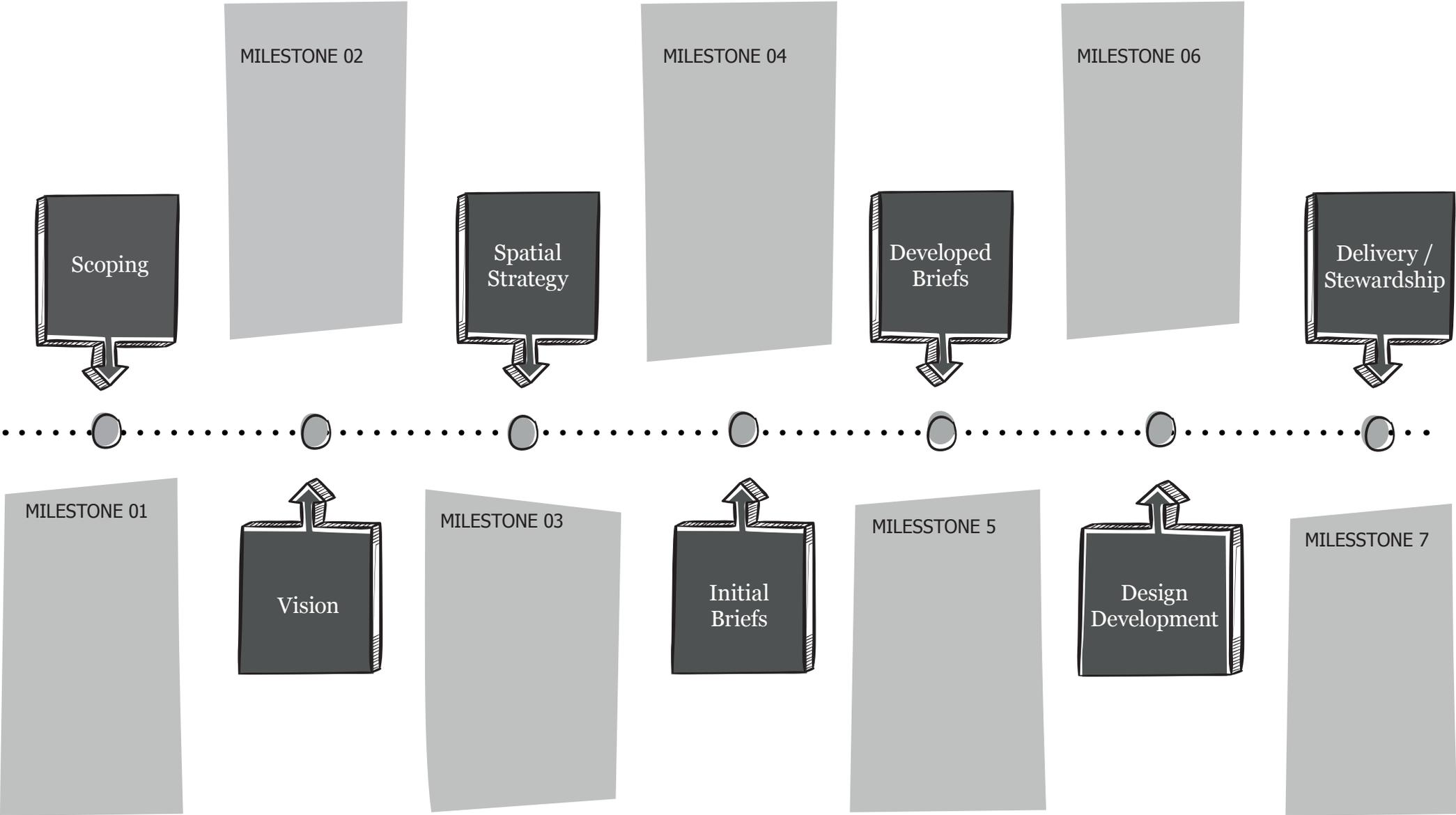
Completing the mapping and prioritisation will help you to develop a clearer picture of who you need to engage and how in taking a place based approach. Depending on the scale of place you are considering and the stage you are mapping at you could choose to complete one overall map, or individual maps for broad groups or sectors.

A list is provided here for some key audiences to get you started. It is not definitive. Be sure to think broadly about people and organisations unique to your place. Supplement your list with knowledge gained through conversations with colleagues and with others through workshops

- **Local Authority:** relevant council services likely to include planning; housing (&) regeneration; education; transport; community planning; economic development; community education; elected members; heads of service.
- **Community:** external communities of interest; local communities; new residents; community planning partnerships; community councils; local businesses; schools; service providers; third sector organisations.
- **Market:** development community; local developers; house-builders; leaders and officers of housing associations or development agencies.
- **Agency:** Key Agencies and service providers; Key Agencies; A&DS; HES; SEPA; Nature Scot; Scottish Water; Scottish Forestry; Land Commission; Health boards; Infrastructure providers; Transport; ICT; water.

Engagement Timeline Template

What do you plan to do, when? This template is to help structure your thinking about engagement into a simple timeline. It can be used in parallel with the Engagement Plan Template (p100).



Team Roles

Sponsorship

- At leadership, management or business unit level.
- Invested in the success of the project and its impact on the organisation.
- Gives permission, energy and emotional support to the core team, and the people they appoint.
- Attends key workshops and project checkpoints to align direction.

Project lead

- Brings content knowledge and stays connected around the organisation.
- In charge of steering the project forward and increasing its success.
- Empathic, 'people'-person who is optimistic, resourceful and doesn't give up easily.
- Often supported by a team member to coordinate schedules, communication and logistics.

Adapted from NESTA's toolkit for - [Designing for Public Services: a practical guide](#)



What they do:

The core team are the soul of the project and its chief designers. They also own the project plan and ensure it stays on track. The Project Lead manages the core team and liaises with the extended and leadership teams.

Key project roles:

The team accountable for the outputs of the project. Owners of the design process. When bringing in collaborators, the facilitators of the conversations and input.



What they do:

These are typically people identified as subject matter experts, and could come from the policy space and/or delivery space. They contribute their expertise to the challenge.

Key project roles:

Providing subject matter expertise. Can also act as reviewers of the core team's work.



What they do:

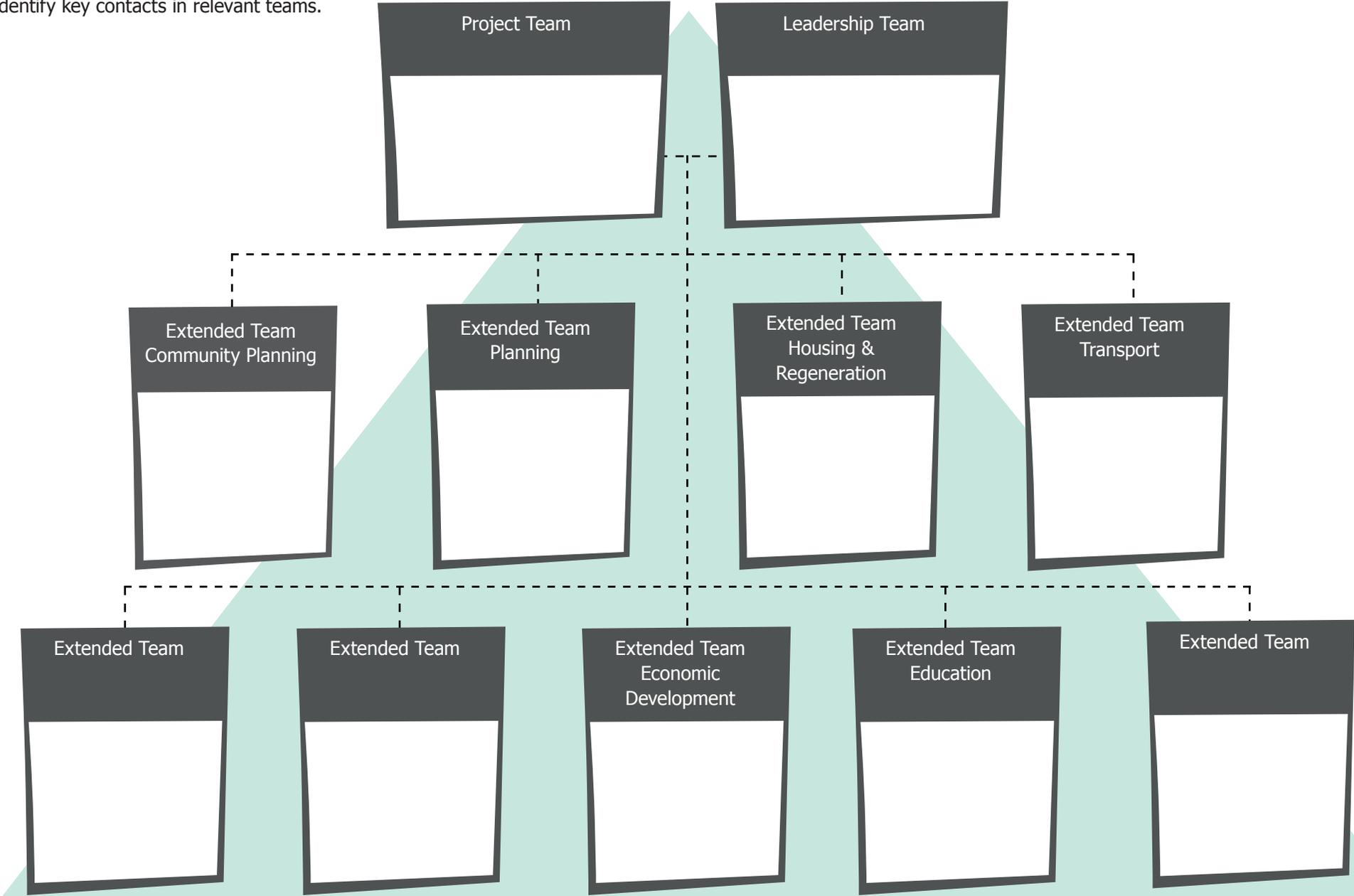
The leadership team are the final decision makers, but they should be kept informed along the course of the project and able to contribute their thinking. They are invested in the outcome and support the work of the team across the organisation.

Key project roles:

Decision-making and air cover for the core team.

Project Team Template

Use this project team template to identify key contacts in relevant teams.



Storytelling Template

What is the basic information that your audience need to know?
You can use this template to structure a briefing note or presentation.

1. Purpose – Why do we need to take a place based approach? What are the compelling reasons for change?

Tip: Tailor this to have importance and meaning to your audience.

Use your headline research to help make a case.

2. Picture – What will the future look and feel like if we take this approach?

Use the overview, and knowledge you've gained to describe the future benefits for your place.

3. Plan – How are we going to get there?

Use your schedule to demonstrate indicative timeframes and milestones along the way.

4. Part – What role will you and your team play to make the change a success?

Use your internal team map to help you.

5. Who will you involve along the way?

Set out the broad groups you will engage, using the stakeholder mapping template.

6. How will you engage and interact?

Schedule and governance proposal. Broadly outline the approach you propose; cross cutting policy, collective corporate leadership, community, development industry and agency involvement, key stages, project team, milestones.

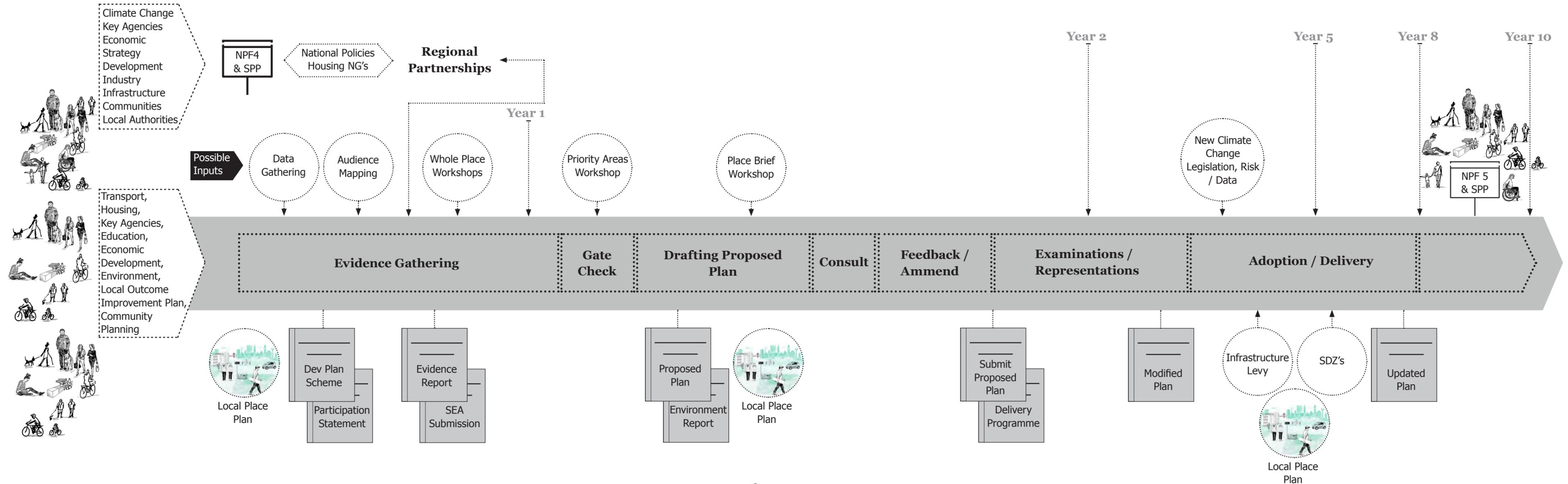
7. What stories or examples of successes are relevant and will resonate with your audience?

See case studies for some possibilities. Generate excitement around the possibilities by pointing to relevant examples of where this has been done already, to help inspire what's possible...

8. What questions will you ask to engage them?

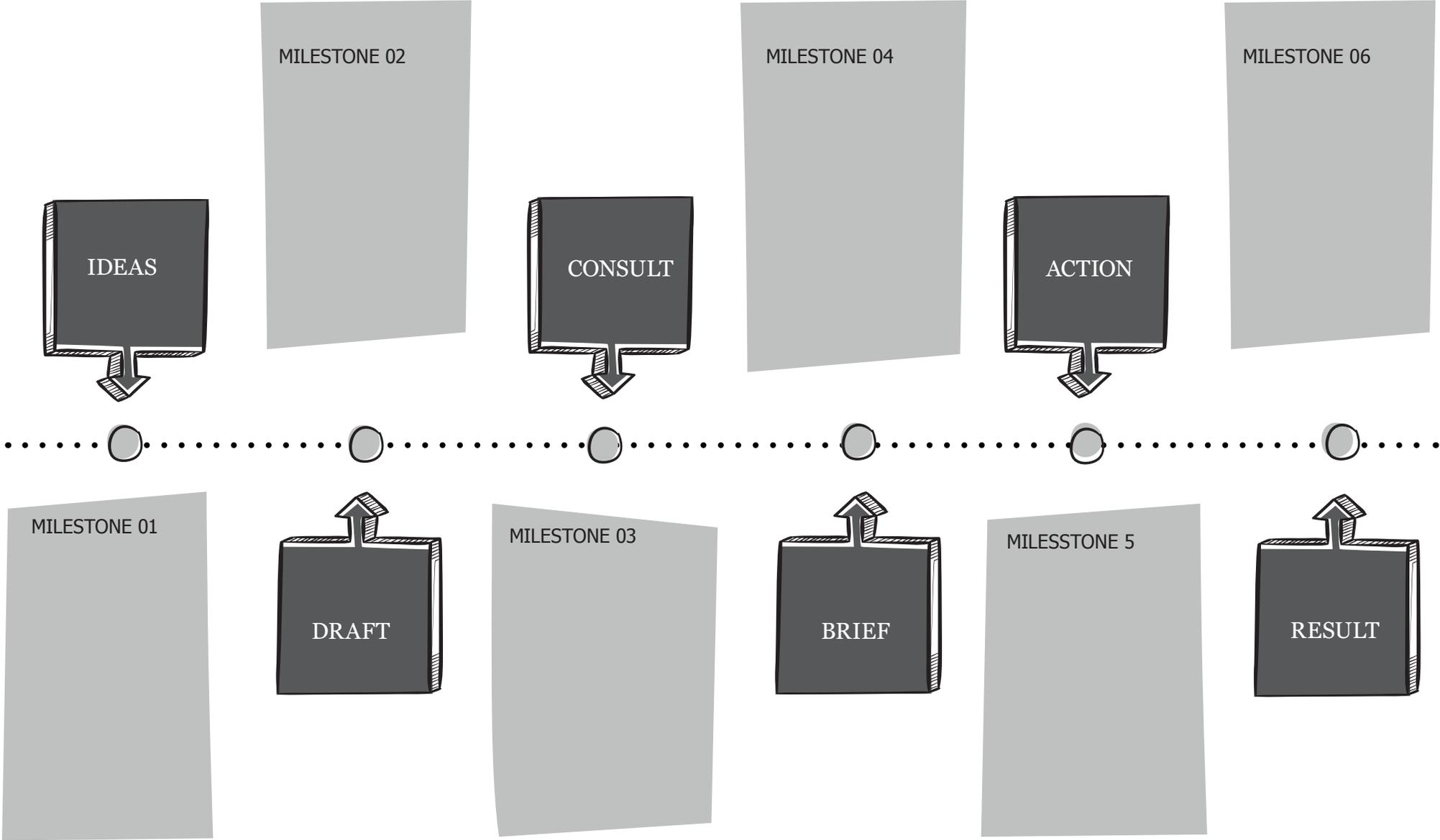
Does the vision resonate with them? What support/action do you need? Can they commit to approach and take action to share vision with others.

Place-Based Local Development Plan Process



Key Milestones

What do you plan to do, when?



Whole Place Workshop Facilitator Guide

Indicative Timing	Activity Facilitation Notes	Lead
30 mins	<p>Set Up Distribute materials needed on each table, load and test presentation and adjust room layout, as necessary.</p>	Lead
10 - 15 mins	Participants Arrival (and refreshments)	
5 mins	<p>Introduction Welcome workshop participants and outline the format and key purpose of the session - <i>to consider the wider place/strategic objectives and identify spatial priorities.</i></p>	Lead Facilitator
10 mins	<p>Setting the Scene Using the baseline information collected prior to the workshop, provide a brief overview of key issues and opportunities already known for the wider area. This overview will help set the scene and lead on to the group work.</p>	Lead Facilitator
30 mins	<p>Group Work – Session 1 Identify Common Strategic and Local Drivers for change In groups, ask participants to discuss and identify shared drivers or ambitions for change at a strategic and local level. Draw on participant’s knowledge of social, economic and environmental factors about the place and associated plans and strategies:</p> <ul style="list-style-type: none"> • What kind of place are we? What is unique about this place? • What kind of place do we want this to be in the medium to long term (10-20 years)? <p>Participants can directly note drivers of change, or use the accompanying SWOT resource to help capture key points (Strengths, Weaknesses, Opportunities and Threats).</p>	Lead Facilitator and Group Facilitators
5 - 10 mins	<p>Session 1 Group Feedback Allow time for each group to feedback to the room on key shared ambitions at a strategic and local level emerging from discussions. This will help the participants have an awareness of common and distinct points raised by each group. Reflect on how the aims resonate with the introductory vision for change. Capture headline reflections for the workshop summary report.</p>	Lead Facilitator and Group Facilitators

Whole Place Workshop Facilitator Guide

Indicative Timing	Activity Facilitation Notes	Lead
30 mins	<p>Group Work – Session 2</p> <p>Identify Priority Areas for Collaborative Action Identify location of priority areas for co-ordinated action, by mapping planned and anticipated change, identifying broad areas and testing against vision and possible future scenarios.</p> <p>Map planned and future change Ask participants to identify where priority areas for co-ordinated action are. Building on the issues and places considered in session 1, participants should record relevant spatial information about drivers for change directly onto maps. Some discussion prompts:</p> <ul style="list-style-type: none"> • Where is there new change or growth? • Where is investment in infrastructure, services or buildings happening or planned? • Where is housing growth or regeneration needed? • Where is future change likely over the medium to long term (10-20 years)? <p>Identify broad areas Where has mapping identified concentrations of priority interests, activities or needs? What scale of place would work to further explore shared ambitions for priority places (eg Whole Settlements, Neighbourhoods, Wards, CPP areas)? Think about soft as well as hard borders – e.g. do boundaries match with what people perceive as places?</p> <p>Test against vision and future scenarios How well placed are the areas identified to support delivery of strategic and local ambitions discussed in session 1? How might these areas change over the next 10-30 years? (Some scenarios to consider include low carbon place, town centre first principle, healthy place, caring place, compact neighbourhoods, assets based). Are the areas identified, the ones with the best capacity, need and opportunity for growth or change? Have any places been overlooked?</p>	<p>Lead Facilitator and Group Facilitators</p>
5 - 10 mins	<p>Session 2 Group Feedback</p> <p>Feedback priority areas identified. Allow time at the end of this session for each table to feedback to the room the identified areas. This is a good opportunity to cross compare each groups' priorities and see where there is consensus.</p>	<p>Lead Facilitator and Group Facilitators</p>

Whole Place Workshop Facilitator Guide

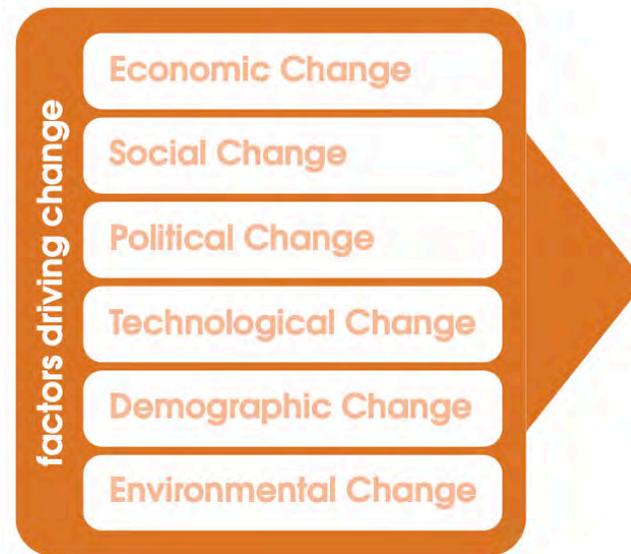
Indicative Timing	Activity Facilitation Notes	Lead
20 mins	<p>Group Work Session 3</p> <p>Next Steps and Stakeholders</p> <p>In groups, participants should discuss and outline next steps for collaboration and engagement. Who needs to be involved (e.g other Local Authority services, the Development Community, Agencies and Service Providers, Community)?</p> <p>Are there any planned consultation activities happening within the identified areas which could contribute to this stage of the development plan process?</p>	Lead Facilitator and Group Facilitators
5 - 10 mins	<p>Closing</p> <p>Thank participants and provide an outline of the next stages and timescales for circulating a report of the output of the workshop.</p>	Lead Facilitator

Strategic Data Pointers

Strategic Data and Ambition Pointers

What are the big strategic social, economic or environmental issues or priorities since the last Local Development Plan or Strategic Housing Investment Plan for your area? The new planning regulations introduce a statutory link between community plans and spatial plans, so your Local Outcome Improvement Plan's vision and objectives will be a principle reference here. Reflect on any issues that may have shifted since its preparation for example:

- Tackling Climate Change,
- Achieving Net Zero Emissions by 2045,
- Addressing inequalities in health and wellbeing,
- Supporting inclusive economic growth,
- Supporting the needs of an ageing population,
- Accommodating aspects of digital transformation
- Public health
- Brexit



▲ Above: National Ambitions National Outcomes, [National Performance Framework](#), Scottish Government.

◀ Left: Factors that drive change: Source [Delivering Better Places](#).

Snapshot 1 Data Pointers

Snapshot 1 Local Data and Ambition Pointers – making the case

Light touch research into what local issues and priorities are:

- What are Local Outcome Improvement Plan and Community Planning Priorities?
- What are the known major investments or disinvestments by relevant departments that may have some impact or bearing in your place over the phase of the next plan?
- Are there particular policies, investment plans or estates strategies you should be aware of from relevant teams?
- Are there known plans for major inward investment by external organisations or companies?
- What are the particular needs and pressures for market and social housing in your area?
- Since the last Development Plan or SHIP, approximately what percentage of housing sites have been developed and what percentage remain undeveloped? Some very light touch analysis of why that might be (for example: market or investment issues/suitability of sites-are they in the right place).
- See Strategic Data and Ambition Pointers pointers.

Snapshot 3 Data Pointers

Snapshot 3 Local Data and Ambition Pointers - developing evidence base

Build on the headline research in Snapshot 1 with further data on the local social, economic, environmental contexts to build up understanding of the senses of place: Capture data on the role of the area in its wider context. What role and relationship does the place play to neighbouring areas, and in a regional and national context? What are the distinct characteristics that will influence location and quality of place for new housing led development in this place? Any more insights on the Strategic Drivers of Change? (hyperlink to Strategic Data and Ambition Pointers pointers resource.)

Social Key socio-economic data on local population characteristics and priorities. What are the images and perceptions of the area for people who live, work, visit or invest here? Ideally, community planning will be aligned here to feed in issues and priorities captured through consultation with local communities. Are there distinct social, cultural, historical factors that influence the character of place? Other sources include census data, Scottish Index of Multiple deprivation, local community plans, Understanding Scottish Places <https://www.usp.scot/>

Environmental Key environmental data on place characteristics and capacities. Are there distinct local elements of climate, geography and landscape that influence place character. Landscape capacity studies, local travel patterns for work and education, local transport strategy, open space strategy, flood mapping, active travel plan, local heat and energy efficiency strategy, surface water management plans, local biodiversity action plans, open space strategies etc. SE web <https://www.environment.gov.scot/>

Economic Key economic data including planned investments and local markets for employment and housing. Employment market information, information on local housing markets, strategic housing investment plans, economic strategies, analysis of housing delivered since previous plans. Performance of area in relation to neighbouring and similar areas.

Snapshot 4 Data Pointers

Build on the headline research in Snapshot 1 & 3 with further local data on the social, economic, environmental contexts to build understanding of the senses of place for priority areas: Capture data on the role of the area in its wider context. What role and relationship do the places play to neighbouring areas? What are the distinct characteristics that will influence location and quality of place for new housing led development in this place? Any more insights on the Strategic Drivers of Change? (hyperlink to Strategic Data and Ambition Pointers resource.)

Social Key socio-economic data on local population characteristics and priorities for the areas in question. Ideally, community planning will be aligned here to feed in issues and priorities captured through consultation with local communities. Other sources include census data, Scottish Index of Multiple deprivation, local community plans, Understanding Scottish Places <https://www.usp.scot/>

Environmental Key environmental data on local place characteristics and capacities of the local areas and potential development sites in question. Links and relationship to surrounding areas. Local character of built form, typology of streets and buildings – typical building heights and lines, established typologies for housing and other development, materials. Natural and built features including landmark buildings and other landscape features, Landscape capacity studies, local topography, key views, local travel patterns for work and education, local transport strategy - ease of pedestrian and vehicular movement, open space strategy, flood mapping of drainage and potential flood risk, active travel plan, local heat and energy efficiency strategy, surface water management plans, local biodiversity action plans, open space strategies, climate change plans, etc. SE web <https://www.environment.gov.scot/>

Economic Key economic data relating to the local area in question including planned investments and local markets for employment and housing. Employment market information, information on local housing markets, strategic housing investment plans, economic strategies, analysis of housing delivered since previous plans.

SWOT Analysis

Identify strengths, weaknesses, opportunities and threats in relation to housing led development in your place.

Strengths What makes this place unique to live? What particular role does this place play in relation to surrounding areas / regionally / nationally? What particular functions, assets or resources does it have? What do people who live, visit, work or invest here see as it's strengths?

Opportunities Are there opportunities offered by changes to strategic contexts (environmental, social, economic, technological etc)? Or to local policies or strategies? By planned changes or investments to services, buildings or infrastructure? Through new linkages or relationships?

Weaknesses What could be improved for people living in this place? What are things that people who live, work, visit or invest here might see as weaknesses?

Threats What strategic and local challenges does this place face that could impact on its place qualities? What are other places doing that compete or offer challenge?

Priority Area Workshop Facilitator Guide

Indictive Timing	Activity Facilitation Notes	Lead
30 mins	<p>Set Up Distribute materials needed on each table, load and test presentation and adjust room layout, as necessary.</p>	
10 - 15 mins	Participants arrival (and refreshments)	
5 mins	<p>Introduction Welcome the workshop participants and outline the format and key purpose of the session - <i>to create a spatial strategy to reflect shared place objectives for the priority area(s)</i>. Highlight the rational for the place-based collaborative approach and the wider vision for change. Tailor the storytelling template and pitch previously developed to make it relevant to the audiences present.</p>	Lead facilitator
<p>10 mins (Plus extra 10 mins if gathering input from participants)</p>	<p>Setting the Scene Use the baseline research and summary outputs from the previous workshop (Snapshot 3), to provide a brief overview of how the priority areas (the focus for the current workshop) have been identified. Telling the story of where is experiencing change or growth; where investment or regeneration is happening or planned; where infrastructure is programmed will help set the scene. If the participant mix differs to those in Snapshot 3 workshop, a brief session (10mins max) which invites additional feedback to the wider vision and spatial strategy is advisable. This could be managed by having maps or summary diagrams from the previous workshops pinned to a wall and collecting participant reflections on post-it notes.</p>	Lead facilitator

Priority Area Workshop Facilitator Guide

Indictive Timing	Activity Facilitation Notes	Lead
45 - 90 mins (Depending on site visited and the tool selected)	<p>Group Work – Session 1: Understanding the Priority Areas</p> <p>In groups, participants should consider the priority area they are focusing on and identify local assets, issues, needs, contexts, places with opportunity for growth or change. A site visit or walking tour of the area would be beneficial to include at this stage. However, if this is not feasible, up-to-date pictures of the area may be a useful aid, alongside the maps.</p> <p>The place standard is a good tool to enable discussion and consideration of different aspects of a place. The tool may be selected to accompany the site visit/walking tour. A summary version can be printed at a large format for use in a workshop setting. See Place Standard Resource.</p> <p>Alternatively, SWOT (Strengths, Weaknesses, Opportunities and Threats) headings may offer a helpful means to capture key information and insights. See SWOT resource.</p>	Lead facilitator and Group Facilitators
10 - 15 mins	<p>Session 1 Group Feedback</p> <p>Allow time for each table to feedback to the room on key findings. This will help the participants have an awareness of the common and different points raised by each group. Capturing headlines about common issues or priorities at this stage may be helpful for the workshop summary report.</p>	Lead facilitator and Group Facilitators
20 - 30 mins	<p>Group Work - Session 2: Identify Ambitions and Locations for growth or change</p> <p>In groups, participants should now reflect on session 1 and consider key locations which may be suitable for development. Seek to identify the best locations within the priority area to address the wider vision for change and with capacity to build on local strengths or address local issues. Some ways to prompt broad thinking about this include:</p> <ul style="list-style-type: none"> • What does a place standard assessment indicate? • How well can this place support different people to live a healthy, happy, low carbon life? • What would a day in the life/year in the life of that place be like? • What will it be like in 30 years – impact of climate change? <p>Persona Tools can highlight perspectives for a range of possible future residents and might be worth considering as a discussion aid.</p>	Lead facilitator and Group Facilitators
10 - 15 mins	<p>Session 2 Group Feedback</p> <p>Allow time at the end of this session for each table to feedback to the room the identified sites or areas of focus.</p>	Lead facilitator and Group Facilitators

Priority Area Workshop Facilitator Guide

Indictive Timing	Activity Facilitation Notes	Lead
<p>45 - 90 mins (Depending on site visited and the tool selected)</p>	<p>Group Work Session 3: Capturing Spatial Design Objectives</p> <p>In groups, participants should identify the key spatial design objectives for sites identified with best potential for growth or change. Seek the key non-negotiables to inform high level briefs for inclusion in plans. Some prompts to consider when establishing the important spatial design objectives include the nature and/or location of:</p> <ul style="list-style-type: none"> • Identity, context, character Role and relationship of the area/site to its surrounding and wider context • Layout key links and routes to support active travel through and beyond, • Layout key streets and edges, grain of development • Landscape greenspace and habitat networks • Mix different uses • Scale & density density, height or massing of built form • Details & materials key materials or character elements • Delivery & maintenance who needs to work together and how <p>See Resource table on elements of development form to consider</p> <p>It may be beneficial to have examples of good spatial design elements printed out to aid discussion.</p> <p>See resources – housing typologies</p> <p>NB Module 2 covers how to collaboratively develop detailed briefs for masterplans</p>	<p>Lead facilitator and Group Facilitators</p>
<p>10 mins</p>	<p>Session 3 Group Feedback</p> <p>Allow time at the end of this session for each table to feedback to the room the key findings of the group discussion.</p>	<p>Lead facilitator and Group Facilitators</p>
<p>5 - 10 mins</p>	<p>Closing</p> <p>Thank the workshop participants and provide an outline of the next stages and timescales for circulating a report of the output of the workshop.</p>	<p>Lead facilitator</p>

Place Quality and Development Form

Place Qualities

The six qualities of successful places underpin the Scottish Government's approach to delivering good places. Successful places are:

- distinctive;
- safe and pleasant;
- easy to move around;
- welcoming;
- adaptable; and
- resource efficient.

Aspects of Development Form

The following considerations can inform briefing for priority places

Identity, context, character

Role and relationship of the area/site to its surrounding and wider context

Layout - structure

Key links and routes to support active travel through and beyond,

Layout - grain

Key streets and edges, grain of development

Landscape

Greenspace and habitat networks

Mix

Different land uses,

Scale & Density

Density, height and massing of built form

Details & materials

Key materials or character elements

Delivery & maintenance

Who needs to work together and how

ASPECTS OF DEVELOPMENT FORM

LAYOUT: URBAN STRUCTURE

The framework of routes and spaces that connect locally and more widely, and the way developments, routes and open spaces relate to one other.

The layout provides the basic plan on which all other aspects of the form and uses of a development depend.

LAYOUT: URBAN GRAIN

The pattern of the arrangement of street blocks, plots and their buildings in a settlement.

The degree to which an area's pattern of blocks and plot subdivisions is respectively small and frequent (fine grain), or large and infrequent (coarse grain).

LANDSCAPE

The character and appearance of land, including its shape, form, ecology, natural features, colours and elements, and the way these components combine.

This includes all open space, including its planting, boundaries and treatment.

DENSITY AND MIX

The amount of development on a given piece of land and the range of uses. Density influences the intensity of development, and in combination with the mix of uses can affect a place's vitality and viability.

The density of a development can be expressed in a number of ways. This could be in terms of plot ratio (particularly for commercial developments), number of dwellings, or the number of habitable rooms (for residential developments).

SCALE: HEIGHT

Scale is the size of a building in relation to its surroundings, or the size of parts of a building or its details, particularly in relation to the size of a person. Height determines the impact of development on views, vistas and skylines.

Height can be expressed in terms of the number of floors; height of parapet or ridge; overall height; any of these in combination; a ratio of building height to street or space width; height relative to particular landmarks or background buildings; or strategic views.

SCALE: MASSING

The combined effect of the arrangement, volume and shape of a building or group of buildings in relation to other buildings and spaces.

Massing is the three-dimensional expression of the amount of development on a given piece of land.

APPEARANCE: DETAILS

The craftsmanship, building techniques, decoration, styles and lighting of a building or structure.

This includes all building elements such as openings and bays; entrances and colonnades; balconies and roofscapes; and the rhythm of the facade.

APPEARANCE: MATERIALS

The texture, colour, pattern and durability of materials, and how they are used.

The richness of a building lies in its use of materials which contribute to the attractiveness of its appearance and the character of an area.

▲ Above: Source: [By Design](#).

Audience Engagement Template

Who, What, How and When

Relationship

Advisory/Regulatory Input, guidance or information.

Facilitative Interact for greater benefit.

Influence Work towards shared benefits or improved outcomes.

Collaborative Work together to achieve shared vision and outcomes.

Who am I?
Audience / stakeholder

Reasons I might want to engage.

1.

2.

3.

Reasons I might not want to engage.

1.

2.

3.

Communication Approach

Inform:

Provide information to assist understanding of issues, options or solutions.

Engage:

Obtain feedback on analysis, options or decisions.

Involve:

Work directly to so needs and aspirations are considered throughout.

Collaborate:

Partnership development of options and solutions.

What?

How?

When?

How to... Use Personas



When developing a robust brief for action it is important to understand things from the perspective of others who live in or use a place.

The best way to capture that understanding is by involving people directly. User engagement should always be factored in to engagement planning.

Sometimes however, direct user involvement isn't possible at or practical at a particular time or a particular workshop. Or where for example, residents of a new neighbourhood don't exist as it isn't built yet.

In such circumstances personas can go some way to helping represent and bring places to life through the eyes of others.

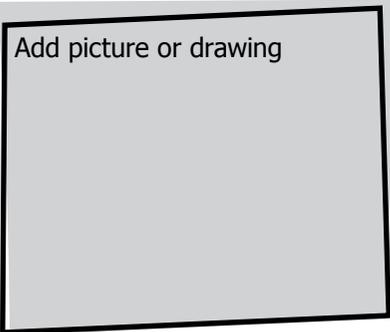
Personas can also support groups to leave behind their own personal or professional perspectives. This can give a richness and depth to the groups' exploration of priority issues. Personas can be prepared in advance or completed by participants in whole or in part during workshops. If you are preparing in advance, think carefully about the range of people who may be future residents of a place and their possible backgrounds, aspirations and motivations. Draw on relevant socio-demographic data where possible.



Persona Tool

I want to consider the needs of future residents by visualising their key characteristics.

Add picture or drawing



Who am I?



3 reasons I might want to live here.

1. _____
2. _____
3. _____

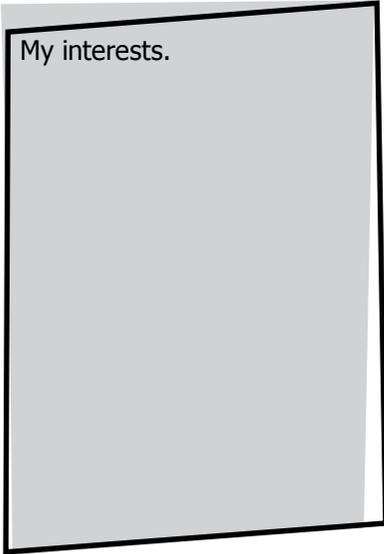
3 reasons I might not want to live here.

1. _____
2. _____
3. _____

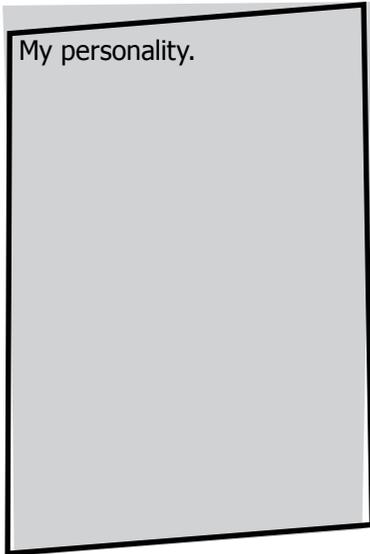
Persona Name

Age

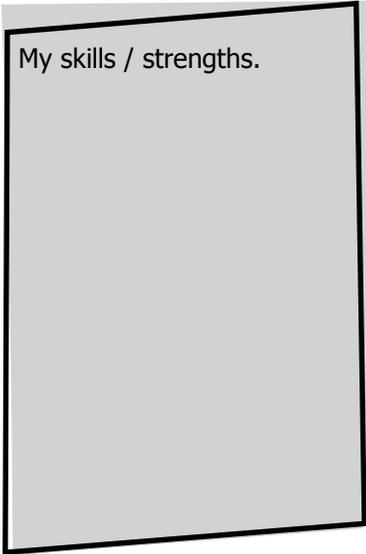
My interests.



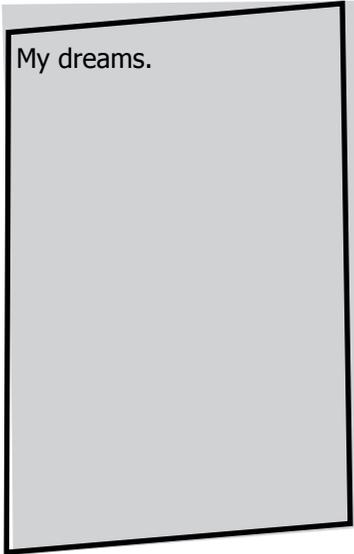
My personality.



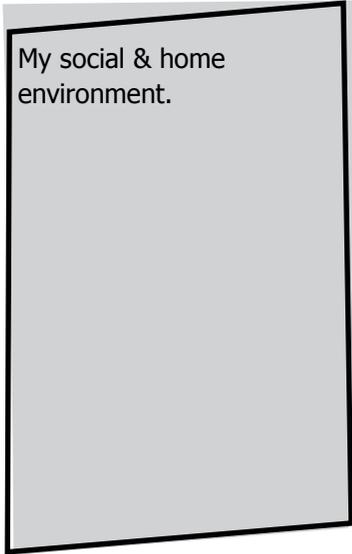
My skills / strengths.



My dreams.



My social & home environment.



Engagement Plan Template

This template is to help structure your thinking about engagement into a simple plan. It can be used in parallel with the Engagement Plan Timeline (p77).

Priority	Stakeholder	Purpose	Messages	Timing	Method	Who	Complete
Eg H, M, L Or 1,2,3	Name if known, or Department, organisation, company, community group, wider community	What do you want to do? Engage, Involve - Collaborate, Inform	What do they need to know? Refer to reasons to engage	Project stage, specific times, frequency	How are you going to engage? eg workshop, Place standard exercise, report, newsletter/blog, social media	Who is responsible? Who will do the communicating?	Yes, No, Ongoing
e.g. H	e.g. Jane McDonald, Housing Lead Officer	e.g. Involve - Collaborate	e.g. Need your involvement in vision, strategy and briefs for success	e.g. Vision, Spatial Strategy, Initial Briefs	e.g. Meetings, Workshops, ...	e.g. Project Lead	e.g. Ongoing
e.g. H	e.g. Sarah Smith, Service Lead Housing	e.g. Engage, Involve	e.g. Need your involvement in vision, strategy for success	e.g. Vision, Spatial Strategy,	e.g. Meetings, Workshops, Reports ...	e.g. Project Lead	e.g. Ongoing
e.g. M	e.g. Wider Community	e.g. Engage/ inform	e.g. Help shape change in your place	e.g. Place Standard Exercise June, Monthly Blogs	e.g. Place Standard Exercise, Blogs,	e.g. Mark Jones	e.g. Y / ongoing

Engagement Plan Template

Priority	Stakeholder	Purpose	Messages	Timing	Method	Who	Complete

Architecture & Design Scotland

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