

## Illustrative Project Engagement Plan

### 1 INTRODUCTION

On request, the Advisory Team for Large Applications (ATLAS) can provide independent advice to Local Planning Authorities and their partners dealing with large scale strategic housing matters. Upon engagement, ATLAS will agree and confirm with the nature of the team's role and tasks within a 'Project Engagement Plan' (PEP) which sets out:

- **The role & purpose of ATLAS**, including the team's overall vision and objectives;
- **Operating principles** including our approach to Quality Assurance and project disengagement;
- **Engagement expectations** of both ATLAS and the LPA;.
- An initial **project appreciation** and the key planning & development issues; and
- The **ATLAS response**, with respect to the team members assigned to the project, defined tasks, and anticipated outcomes.

The PEP document represents the formal record of ATLAS engagement, and should be treated as a 'live' document that will need to be updated as the project progresses. It has no formal statutory or legal status but in effect sets out a basic Memorandum of Understanding between the Council and ATLAS as to how ATLAS will engage and provide support in respect of the project.

### 2 THE ROLE & PURPOSE OF ATLAS

The following overall mission statement underpins the operation of the ATLAS service:

*"To secure the timely delivery of high quality sustainable development through effective planning processes, collaborative working and the promotion of good practice."*

This vision will be met by addressing the following objectives:

- Acting to provide help and support to Local Planning Authorities (LPAs) that are dealing with issues and challenges related to large scale growth
- Bringing an impartial and independent perspective on issues;
- Helping local planning authorities to develop better and more consistent interaction with the key stakeholders;
- Ensuring the lessons learnt from ATLAS's work are disseminated widely to local planning authorities and the wider development community; and
- Contributing to the establishment of a collaborative planning system based on the principles of holistic sustainable development, spatial planning and development management.

### 3 ATLAS OPERATING PRINCIPLES

The following core principles underpin the nature of ATLAS engagement in project work:

- ATLAS only work where the LPA requests support;
- ATLAS provides an 'enabling service' taking the role as "critical friend" of the Local Planning Authority (LPA);
- Whilst working with the LPA first and foremost, ATLAS will endeavour to work openly with other key stakeholders in particular the private sector to build trust and ability to influence;
- The LPA or any other project partner is under no statutory obligation to follow the advice we provide;
- The advice we provide will be impartial and independent – we will say it as we see it which may or may not support the position being taken by any specific stakeholder (including the LPA);
- Advice we provide will be for the benefit of all, under an overall ethos that the 'project' is the client;
- ATLAS will aim to enable and support the project partners to deal with and resolve issues as they arise based on the knowledge and experience of the team;

- ATLAS does not provide a direct case officer style resource, although will in some cases offer to undertake specific pieces of work if the project requires it;
- ATLAS promotes that a collaborative, open and transparent process is followed by all parties where possible;
- ATLAS will not charge for its services;
- ATLAS is engaged in many active projects at any given time and draws upon its project work in order to inform its activities, to continually improve the ATLAS offer, and to disseminate best practice. ATLAS may therefore from time to time wish to utilise aspects of project work as case study material, which may necessitate a project being identified. ATLAS will however always strive to maintain the anonymity of individuals involved with a project when requested to do so;
- ATLAS will always endeavour to provide it's independent opinion, but will not be the final decision maker on issues. These must reside with the relevant body. In particular, local democratic processes remain unaffected; and
- ATLAS retains the right to disengage from any project without recourse, but will only do so under certain circumstance (see below).

### ATLAS Quality Assurance

ATLAS is committed to providing a quality professional service and has several processes in place to evaluate the delivery of the service. Such measures include:

- An independent evaluation process whereby all ATLAS project partners are interviewed regularly (by external independent consultants) to assess ATLAS performance against defined tasks;
- An opportunity for project partners to provide feedback directly to ATLAS on performance at any time during project engagement; and

- A formalised disengagement process to consider the overall value of ATLAS engagement and any lessons-learned.

### Disengagement

ATLAS reserves the right to disengage from any project although would seek to ensure that this only occurs where and when appropriate, most likely under the following circumstances:

- All ATLAS tasks are completed;
- The project ceases to be being pursued;
- If tasks are proving unachievable or taking an unreasonable level of resource compared to project progress or added value;
- Lack of trust or support of ATLAS advice; or
- On request of the Local Authority who retains the right to at any time request ATLAS to disengage.

## 4 ENGAGEMENT PRINCIPLES & EXPECTATIONS

### Expectations of ATLAS

LPA's and other project partners can expect the following from ATLAS staff during the course of engagement:

- ATLAS will seek to formally agree and record tasks and activities as required by the project;
- ATLAS will respond to requests for assistance in a reasonable and timely manner;
- Before using any aspects of a live or closed project for wider dissemination, ATLAS will seek to ensure that the LPA is comfortable with this;
- ATLAS will endeavour to provide advice and assistance based on good and best practice; and
- ATLAS will operate with discretion and courtesy; and will provide honest and open advice at all times.

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### Expectations of the LPA

By engaging with ATLAS, the following will be expected from the LPA:

- The LPA will act in an honest and transparent manner, ensuring that ATLAS is aware of and if necessary involved in all matters that will influence the tasks ATLAS have been set or the progression of the project;
- Where necessary the LPA will facilitate ATLAS engagement with other LA corporate and partner organisations and individuals when requested and as necessary to assist project progression;
- The LPA will be required to respond to and engage with an independent evaluation process of ATLAS on request by consultants appointed to undertake this task on an ongoing basis;
- On disengagement, the LPA will be requested to complete a proforma to review the scope and quality of ATLAS engagement and in the majority of cases attend a formal disengagement meeting;
- The LPA should endeavour to learn and build their knowledge and internal capacity through ATLAS engagement.

## 5 PROJECT APPRECIATION

To be completed in response to the project in question.

## 6 THE ATLAS RESPONSE

### Proposed ATLAS Team

To be completed.

### ATLAS Tasks

To be completed

### Anticipated Outcomes

Project partners will be contacted through the independent evaluation process through which the impact of ATLAS support is assessed with reference to a number of general “added value measures”.

ATLAS support would be anticipated specifically to have positive impacts across a number of the following defined measures (subject to future review):

Added Value measure	Definition
<b>Improving project management</b>	Improving project management processes and procedures within Local Planning Authorities (LPA) and across the other partners involved in delivering projects
<b>Resolving critical blockages</b>	Enabling partners to clarify and address key blockages in the system
<b>Increasing capacity to deal with large scale development</b>	Building confidence, skills and knowledge in the individuals, and, when requested, the organisations involved to enable them to make more effective and efficient decisions in future



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1<sup>st</sup> July 2013

Dear Mr Smith,

### **Request for ATLAS engagement in relation to East Herts District Plan**

East Herts Council has reached a critical stage in the preparation of the District (Local) Plan, and is hoping to take a draft Plan into the public domain later this year, prior to full public consultation. The draft plan is anticipated to include a number of large proposed housing allocations, and will feature proposals for significant volumes of market and affordable housing as well as employment and other land uses.

The shortlisted potential development options present a number of outstanding delivery issues. If possible the Council would like to request assistance from ATLAS in order to expedite finalisation of the plan. ATLAS involvement would be likely to focus on helping the Council to find a way forward in respect of the preparation of a suitable evidence base. If necessary and appropriate this may involve direct engagement with relevant external bodies.

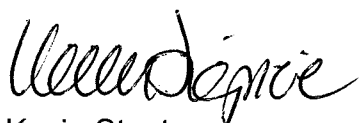
ATLAS has provided significant and very helpful assistance to the Council in the past, most recently in relation to the planning applications for an urban extension at Bishop's Stortford North. I hope that we are once again able to draw on your extensive experience and skills.



INVESTOR IN PEOPLE

Given the tight timescales involved in preparation of the plan we need to progress the project without delay. I would therefore be very grateful if you could confirm your ability to assist us in this matter at your earliest convenience.

Thanks and Best Regards,

A handwritten signature in black ink, appearing to read 'Kevin Steptoe', written in a cursive style.

Kevin Steptoe  
Head of Planning and Building Control  
East Herts Council