

# the planning exchange — a brief history

Former Director **Tony Burton** reflects on the history and achievements of the Planning Exchange, which operated between 1972 and 2002 — with contributions from **Linda Houston**, **Peter Roberts** and **Ian Watson**

The Planning Exchange was established in Glasgow in 1972 as an offshoot of the Centre for Environmental Studies (CES), which was established by Richard Crossman, Minister of Housing and Local Government in the Wilson administration of 1964–1970.

Crossman recounts in his diaries how he was frustrated by the lack of innovative ideas coming from the Civil Service, so he set up a Research Advisory Group (RAG) to examine research needs in planning, starting with a three-day conference at Churchill College, Cambridge, in August 1965. Among those attending were architects, economists, geographers, building contractors, politicians, administrative civil servants, planners, officials of the Ford Foundation (which financed the conference), and directors of research organisations in Britain, the United States, the Netherlands, and Japan.

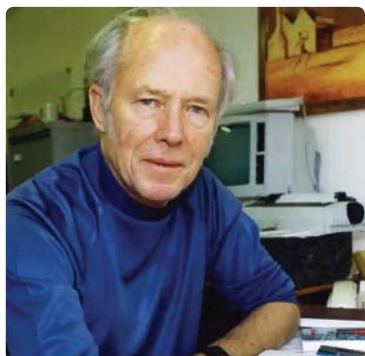
In his opening address Crossman argued that while independent research councils had been established for research in the natural sciences and agriculture, there were none in the social sciences, and that there was a serious case to be made for setting one up specifically for the urban environment. The consensus of the conference was that research in the still untidy planning field involved many disparate sciences and technical disciplines, and the primary need was for a forum in which the people concerned could be brought together. It also concluded that the agency should have the secondary function of channelling funds to university research centres and other institutions capable of carrying out multi-disciplinary studies in the planning field.

A third function, which the conference had regarded as of equal importance, was to provide an intelligence service—to collect, interpret and disseminate relevant

knowledge of the research work being done on planning problems and to impact on the development and retraining of professional practitioners.

The architect and planner Lord Llewelyn-Davies emphasised the massive scale of urban redevelopment which the UK was bound to undertake, with or without the benefit of adequate planning. He argued that the immense problem of obsolescence, which would hit every industrialised country, was hitting Britain first because it had been the first to respond to the constructional demands of the Industrial Revolution. Professor of Planning Peter Hall stated that decisions on the planning of urban renewal and development in Britain were being taken in almost total ignorance of the existing economic, social and physical structure of towns and the countryside, and of relations between them.<sup>1</sup>

CES was the outcome of these discussions and was established in London in 1966 as an independent charitable trust to promote research in town planning and related fields. It began with a \$750,000 grant from the Ford Foundation, matched by a grant from the UK government, to be spent on staff and also given to researchers in various universities across the UK. The first Director was Henry Chilver, Professor of Civil Engineering at University College London; the Assistant Director was Dr Alan Wilson, a mathematician and nuclear physicist and a member of the Department of Transport's Mathematical Advisory Group. Chilver and Wilson brought together people with skills in mathematical modelling and started to apply these skills to urban issues and consider how and where research could most effectively be undertaken. Two years later, Henry Chilver left to take up the post of Director of Cranfield



**Centre for Environmental Studies Director Professor David Donnison, whose concerns over engagement with local authorities outside London and the South East led to the formation of the Planning Exchange; Professor J Barry Cullingworth, the first Director of the Planning Exchange; and Tony Burton, Executive Director from 1975**

Institute of Technology, and Professor David Donnison from the London School of Economics took over in 1969, bringing an interest in social policy issues, particularly housing, and thereby widened the spread of research interests at CES.

In 1971, central government increased its grant to CES, and asked that local authorities should become more directly involved in its work. But Donnison became increasingly concerned that CES was failing to engage sufficiently with local authorities, particularly those far from the South of England, and he introduced the idea of setting up a subsidiary unit away from London to get closer to local authorities and help them better understand and implement the results of urban research.

The idea was taken up by the Scottish Office in Edinburgh, who agreed to match funding, gave the unit the name 'The Planning Exchange', and decided it should be based in Glasgow. Donnison stated that the aim of the Planning Exchange was to provide a forum for the debate of problems in the regions. It would bring in leaders of civic organisations and community action groups. It would start with planning problems, but it was hoped that, in time, it would expand to cover other interests and wider areas, and he saw the Planning Exchange as probably one of the most important ventures launched by CES.<sup>2</sup>

### Setting up

The creation of the Planning Exchange in Glasgow was announced on 5 April 1972 by CES:

*'It will be the first of its kind in Britain, it will operate initially over West Central Scotland as part of the CES general concern that research work is understood and used in policy making. The Exchange will therefore seek closer relationships between the research workers and the policy makers, developers, property owners, voluntary bodies and the public.'*

The first Director of the Exchange was Professor JB (Barry) Cullingworth, Director of the Centre for Urban and Regional Studies at the University of

Birmingham. Initial CES finance was £10,000 a year for the first three years, matched by £10,000 by the Scottish Development Department, part of the Scottish Office, for the same period. Welcoming the new 'pioneering planning agency' the *Glasgow Herald* editorial of 6 April 1972 stated:

*'It is to be hoped that this will not become merely another talking shop—there are quite enough of these in Scotland at present. We would hope that the new exchange will act as some form of central registry for new ideas [...] It is sometimes ridiculously difficult for ordinary people to discover the full extent of plans involving their areas and few realise how much effort amenity bodies make to protect the public interest.'*

The *Daily Telegraph* stated on the same day: *'It is hoped that the exchange, which could be the forerunner of similar centres, will be in operation by the autumn.'*

It was thought essential that the Exchange was not based in a university. The magazine *New Society* wrote in an editorial:

*'The London based Centre for Environmental Studies did a fair amount to foster contact between town hall and the academic world. Something less formal was needed. Hence the notion of an exchange—where useful information could be found and contacts made, in sociable non-academic surroundings.'*

The *Scotsman* newspaper editorial on 6 April 1972 stated:

*'As the scope and complexity of the planning function has increased, it has become increasingly clear that there is a need for overall coordination of planning. Planners at all levels need to know what others are doing. They need to share their expertise, to work together rather than in closed circuits: to be as fully cognisant as possible of the work of academics and the researchers; and to be able to benefit from both the successes and*

*the failures of their counterparts both in this country and abroad. They also need far better information on the needs and desires of those for whom they plan.'*

It added presciently:

*'One may wonder whether the budget of £60,000 spread over three years provided equally by the CES and the Scottish Development Department is adequate.'*

### **First steps and problems**

A committee of CES was established in March 1972, with WL Taylor, former Labour Leader of Glasgow Corporation and a Governor of CES, as interim Chairman. Barry Cullingworth took up his post as Director of the Planning Exchange on 1 October 1972, with the opening of its first office in Glasgow. Cullingworth presented his first progress report to the Governors of CES on 19 October and reminded them that:

*'Our major objectives are to increase understanding of planning problems and policies, to facilitate communication between the enormous number of groups and interests who are involved in planning, to encourage the use and increase the relevance of research, and to generally improve the quality of debate on planning.'*

But the problem of finance was immediately apparent. Cullingworth went on to explain that the Exchange was immediately operating under:

*'... very severe constraints. Essentially these stem from the fact that we are seriously underfunded, and it is proving exceptionally difficult to raise finance. All the traditional bodies we have approached have expressed enthusiasm for the Planning Exchange but have regretfully declined to support us, generally on the ground that our activities do not fall within their terms of reference.'*

This was not untypical of the social science research environment of the time. Research funding was more adequate than before, but funding for dissemination, discussion, application and learning was usually meagre, if not ignored altogether. Cullingworth reported that:

*'Nuffield, Leverhulme and the Social Science Research Council all say basically the same thing: they will only support **research**. We have approached 14 bodies, but so far with no success.'*

There was only enough money to pay for the Director, one other member of staff, and a secretary. These outgoings, together with rent and minimum expenditure on furniture and equipment, exhausted the funds. There was no capital fund at all.

To make matters worse, the Scottish Development Department, in announcing the Planning Exchange to local authorities, had promised that they would

not be asked to contribute except by way of fees for 'courses' until an initial period of three years was passed. Clearly insufficient thought had been given to the minimum effective size of such a venture, its costs, or how longer-term finance was to be found.

Cullingworth felt that the only way forward was to make a move away from the idea that the Exchange should not itself conduct basic research (that being the role of CES and the universities), by taking on a few of what he saw as more practical research projects on topics such as public participation in planning and housing reform.

Real help came in mid-1973, not from any organisation in the UK, but from the Ford Foundation of America, which sent a cable on 19 July stating that it had approved a \$100,000 grant for the Planning Exchange, the money to be spread over three and a half years and paid to CES for the Planning Exchange. The Ford Foundation had been a major funder of CES in the 1960s and was supportive of what the Exchange was set up to achieve. Meanwhile, the official opening of the Exchange took place in March 1973 in rented premises at 186 Bath Street, Glasgow.

By September 1974 the Planning Exchange was establishing itself as a centre of discussion, learning and information across Scotland—no longer seeing itself as restricted to West Central Scotland. The Planning Exchange Committee in Glasgow started a move to become independent of CES, and the Ford Foundation gave its blessing, stating in a letter: 'There would be a bit of paperwork involved but moving towards independent status does have some advantages for both you and CES.'

In May 1975 a complete re-organisation of local government in Scotland resulted in the abolition of the multiplicity of authorities, which were replaced by regional and district authorities, of which Strathclyde Regional Council, with a population of two and a half million, was the largest. Many elected members and officials from the new regional council were enthusiastic for applied intelligence on planning and related matters.

At the same time Cullingworth moved to take up a job as official historian of the New Towns, and Tony Burton was appointed Executive Director. The Ford Foundation confirmed its continued support and wrote:

*'It was a rather grim future the Economist painted last week for your city. One can't question the need for an institution like the Planning Exchange.'*

A major step in solving the finance problem was the agreement by the Scottish Development Department to match, pound for pound, grants from Scottish local authorities. Burton immediately set out to meet directors of planning in Scottish local authorities to persuade them to become members of the Exchange, with the promise that whatever they paid would be doubled by the Scottish Office—this was found to be very persuasive.<sup>3</sup>

## The information service

The development of an information service was a key factor in the success that the Exchange had in acquiring financial support by way of local authority membership in Scotland. From its very beginning the Exchange devoted considerable resources to building up a library, initially for internal use and in relation to providing material for courses, conferences, and seminars,

Instrumental in the creation of the information service for planners was the secondment to the staff of Brenda White, a member of the Planning Research Unit at Edinburgh University. She wrote in the *Surveyor* magazine in September 1974 about the results of a three-year research project<sup>4</sup> into various aspects of planning information:

*'As work proceeded a bias gradually developed towards the requirements of planners in local authorities, since it is obvious that this is the sector in which the need for efficient information provision is most acute and in which least effort has so far been made. [...] Several planning departments have expressed interest in the planning classification being developed as part of the research project [and] work on testing the classification will form part of the general development of the research results which is now being planned at The Planning Exchange.'*

Brenda White noted that, to work effectively, local authority planning departments needed to have relevant information from all other departments, as well as from the private and voluntary sectors. So any useful information service for planners would have to be developed on an integrated basis which cut across many local authority departments, particularly housing, roads, parks, transport, and economic development.

The library was expanded to gather a wide range of material: official publications, journals, books, and semi-published (or 'grey') literature.<sup>5</sup> This latter category was of vital importance and included material such as Scottish Office Circulars, Planning Advice Notes, discussion papers (for example on public participation in planning), local authority impact studies (for example on out-of-town retailing), policies, local plans, strategic plans, etc. By their very nature, and in the pre-web days, many of these documents were inaccessible or unknown to practitioners. This kind of literature, together with useful articles in journals, provided the basis for the exchange of knowledge, experience and good practice implied in the name Planning Exchange. Although its activities were directed at a Scottish audience, the literature was sourced from throughout the UK and beyond, on the basis that all knowledge and experience was potentially relevant.

By December 1974 the library contained over 6,000 documents relevant to planning, of which some 3,000 items were catalogued using a classification

system devised by Brenda White, along with a short abstract written by the librarians.

Key to future development was a Leverhulme Foundation grant for a project to test the usefulness of a weekly bulletin of such abstracts sent to councillors in three local authorities for a period of three months—they were invited to ask for the full text of anything that interested them. Disappointingly, the take-up by councillors was only about 10%, and the project was about to be discontinued on the grounds of its low effectiveness, set against considerable cost. But then several officials in the three local authorities asked for the service to be continued because staff were finding it useful in their work, and this led to the development of a weekly *Information Bulletin*, primarily aimed at officials—not just in planning departments but also in housing and social work.

As demand grew, the number of qualified librarians increased to three, joined in time by clerical support assistants. An important part of the specialist librarian's job is bibliographic control: the identification, description, analysis, and classification of books and other materials of communication so that they may be effectively organised, stored, retrieved, and used when needed. The key to this task is building networks of people and organisations. Links were established with government departments, local authorities, research bodies such as the Unit for Retail Planning Information, professional bodies and organisations such as the Town and Country Planning Association, and many others. These various organisations were encouraged and cajoled into seeing the Exchange as playing an important role in disseminating their research. Much of the librarians' time was spent scanning periodicals (around 120 subscriptions), HMSO lists, etc. to identify and order relevant documents.

## Information retrieval

The abstracts were typed on A4 paper, three to a sheet, and several copies were made of each sheet. The sheets were then cut into three to produce multiple copies of each abstract, which were then filed (in cardboard trays) by author(s) and classification code(s) and document number. This cheap and cheerful system worked well, but retrieval by classification code tends to produce high recall and low precision.<sup>6</sup>

To improve precision, a punched-card system was tried. Each subject term had its own index card, which was divided into a grid, with a hole punched at grid locations corresponding to specific document numbers. If document number 25 was about the economic impact of out-of-town retailing, a hole was punched at grid location 25 on the subject cards for 'economic impact', 'retailing', 'town centres', and 'out-of-town development'. To find documents satisfying multiple search terms, the subject cards were held up to a light. Documents having all the subject terms (the Boolean 'AND')

would show up as illuminated spots at their respective grid locations.

This system was time consuming and not very efficient, and by 1984 it was straining to cope with some 10,000 abstracts.

### **PLANEX online database**

In the early 1980s computers were becoming more affordable, and in 1984 a mini-computer (a DEC PDP 11/23 Plus) was acquired along with bespoke software to create a searchable database of the abstracts, print the weekly *Information Bulletin*, and provide a quick way of finding documents that matched multiple index terms. New abstracts were typed directly into the computer while work began on inputting the existing 10,000 hard-copy abstracts.

From the start it was envisaged that remote, dial-up access would be provided to the database, or PLANEX as it came to be known. PLANEX covered urban and rural planning, economic development, and housing policy and practice, with abstracts of articles from journals, research reports, government publications and information from the European Economic Community, and other literature, including semi-published and hard-to-find materials.

PLANEX was signed up to Pergamon Infoline by Charles Oppenheim, then Infoline's Product Development Manager, later to become Professor of Information Science at the University of Strathclyde, and a future collaborator with the Planning Exchange. It was a proud achievement of the Exchange to create what was probably Scotland's first commercially available online database. Meanwhile, membership of the Planning Exchange had expanded to many government agencies, research organisations, charities such as Friends of the Earth, and private developers and consultancies.

### **Enquiry service and document delivery**

There are generally two sides to an information service: current awareness, and enquiries (or research support). The weekly *Information Bulletin* contained abstracts of new publications, mainly on planning and housing, while the growing interest in economic development was covered in the monthly *Economic Development Digest*. All staff in Planning Exchange member organisations were entitled to phone in subject enquiries, such as requests for examples of tenant participation initiatives. The three librarians, now known by the more apposite title 'Information Manager', would search for and supply abstracts. Answering such enquiries enabled the information managers to acquire subject knowledge and an understanding of customer needs which fed back into document selection.

Reports and books were issued on loan, while periodical articles were supplied as photocopies, all by post. In the late 1980s fax delivery of photocopies was offered, but uptake was low. Eventually the arrival of email would render fax redundant.

In the mid-1990s the UK government, through the Scottish Office, decided to re-organise local government again by abolishing regional councils and introducing 32 unitary authorities providing all services in their area. As the Exchange was reliant on local authorities in Scotland for some two-thirds of its funding through membership, it was decided to broaden the range of the information service to cover most local authority services, including, for the first time, education and all social services. Local authorities were encouraged to join as a whole but could join on a single- or multiple-department basis if they wished; and the plan worked in that financial support across Scotland increased by some 10%.

### **Copyright**

Respecting copyright is an important part of an information service, and the information managers kept abreast of developments and opinion on good practice, taking advice from authorities such as Professor Charles Oppenheim. In the early days the view was taken that a single copy of a journal article supplied to an individual for non-commercial research or private study could fall within exceptions to copyright, in particular the concept of 'fair dealing',<sup>7</sup> which was and remains a grey area. One test is to ask the question: 'Would the copyright-holder be pleased or indifferent about the copying?'. The answer 'yes' to either suggests that copying is low risk and unlikely to harm the interests of the copyright-holder. For certain types of trade journals this risk was acceptable, but as the number and range of periodicals taken by the Planning Exchange grew the position was kept under review, and by 1991 it was decided to licence the operation through the Copyright Licensing Agency and pay the required fees.

### **Planning law and practice**

#### **SPADS— Scottish Planning Appeal Decisions**

Local authority decisions on applications for planning permission may be appealed to central government. In Scotland the central authority was the Secretary of State for Scotland until devolution in 1999, when authority was vested in the Scottish Government. The decision letters and accompanying Reporter's Reports are a good example of hard-to-find grey literature which is extremely useful. Although the reports explicitly did not create precedents, they offered useful insights into planning law and guidance in practice. In response to demand, from the early days of the Exchange the library and information service published quarterly summaries of decisions, backed up by an on-demand photocopy service.

#### **Scottish planning law**

Scotland has its own legal system, and this covers planning and environmental law. Realising that local government planners did not get enough opportunities to meet each other to discuss how they went about



implementing planning law, the Exchange early on set up a Development Control Group. It soon became obvious that planning law journals were essentially focused on English law. Working with Eric Young, a Lecturer in Law at the University of Strathclyde Law School, the Exchange decided to set up a journal dedicated to Scottish planning law and practice, with Young as its first Editor. The Law Society of Scotland agreed to pay for the journal to be professionally printed and incorporated as a supplement to its own journal on a quarterly basis—this meant that over 10,000 Scottish solicitors had access to up-to-date information on planning law and its application, and the modest cost of additional copies meant that planners and other interested persons could buy the journal at a very economical price.

The first issue of *Scottish Planning Law & Practice* (SPLP) came out in September 1980,<sup>8</sup> and the *Glasgow Herald* included a piece on the new journal on 16 September 1980, stating:

*'The editors of the periodical say that until now there has been no journal devoted to the law and practice of planning in Scotland. The value of the development that passes through the planning system in Scotland every year is over £1 billion.'*

In the late 1980s the journal incorporated the growing field of Scottish and European environmental law, changed its name to *Scottish Planning & Environmental Law* (SPEL, with its own SPEL-binders), and became a bi-monthly journal. It received a substantial grant from the the Law Society of Scotland to go it alone. At the time of writing, SPEL continues now as an e-journal.<sup>9</sup>

**Ledis and Udis**

**Ledis**  
*Ledis, Local Economic Development Initiatives,* was a loose-leaf monthly Planning Exchange

publication aimed at all those in local government and elsewhere who were attempting to come up with solutions to local unemployment, a shortage of jobs, and a lack of enterprise in their localities.

The UK had been going through a recession, with low rates of economic growth, and by 1980 there were around 1.5 million unemployed in the UK. In addition, technological change, combined with cheaper production methods in some countries outside Europe, had led to massive redundancies in larger-scale industries. British Steel, for example, had established British Steel Industries to support local economic development in steel closure areas, and British Coal did something similar.

A problem with many so-called local economic development initiatives was that reliable information about them was absent or hard to find. Most started with a press release which often gave an over-optimistic projection of success and the number of jobs to be created, while third-party assessments or evaluations could take months or years. A great many initiatives were being developed across the UK, often with funds from the European Economic Community (EEC), but local authorities and others did not hear about them in any systematic fashion.

Together with URBED, the Planning Exchange designed a method of documenting and disseminating information about these initiatives by creating a network of correspondents across the UK, with an editor based in Glasgow. Working with the Exchange's information service the editor would identify initiatives and commission a contributor to obtain first-hand information about the project, usually by interview. The editor's task was to condense this information onto two sides of A4 and fact check with the initiative before publication.

Sample *Ledis* fact sheets were produced in March 1981, and the full service developed soon afterwards. Some six fact sheets were circulated to subscribers each month, and the scope widened to include fact

**Far left: SPEL (Scottish Planning & Environment Law), founded in 1980, continues as an e-journal. Near left: A copy of the LEDIS loose-leaf publication**

sheets on overarching themes such as the government's Loan Guarantee Scheme and European Coal and Steel Community finance. One subscriber remarked that *Ledis* was unique in being a very useful publication held together with a paper clip.<sup>10</sup>

By July 1983, 648 individuals or bodies were receiving *Ledis* monthly; and 1,000 copies of eight *Ledis* sheets were provided to Radio Clyde as part of an information pack to supplement a radio series on community businesses—and following heavy demand a further 1,000 were supplied. Twenty-five correspondents had written for *Ledis*.

Both the EEC and the Organisation for Economic Co-operation and Development (OECD) had expressed interest in *Ledis* as part of international systems for the exchange of information on best practice in local employment initiatives, with the Planning Exchange identified as one of the leading centres in this field of activity. This interest developed later into the Exchange winning, along with two other organisations, a contract for £160,000 a year for two years from the EEC to set up and manage a European centre for disseminating information on local employment initiatives in Brussels, entitled Elise (European Local Initiatives Service).

In October 1983 the Gatsby Foundation offered a further grant of £44,000 over 18 months to continue the basic *Ledis* service. A year later a three-year review of *Ledis* found that:

- On average, six people used *Ledis* in each organisation that took it, giving a total of some 4,000 users.
- About half the users were in local government.
- Many large firms were also using *Ledis*, including Abbey National, BAT, Bank of Scotland, Legal & General, United Biscuits, and Whitbread, reflecting the perceived needs of many large companies to support local employment and enterprise initiatives.
- 51% of users said that they had contacted other initiatives through *Ledis*.
- 70% of users claimed that *Ledis* had helped them to make better decisions.
- Nearly a third of users said that information in *Ledis* had influenced the format of an initiative that they were responsible for.
- Overseas users included Auckland City Council in New Zealand ('*Ledis* will possibly greatly influence decisions taken here') and the Turkish Grand Assembly ('The philosophy represented in *Ledis* initiatives are highly new and interesting to us').

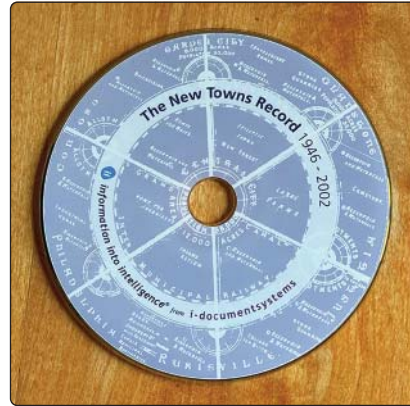
In addition the Exchange organised a series of annual *Ledis* conferences around the UK.

### **Udis**

*Udis*, *Urban Development Initiative Service*, was organised on similar lines to *Ledis* and covered both descriptions of grants and other support available to local authorities and other bodies to carry out improvements to towns and cities and also carefully

checked facts on the costs and relative success of individual or area-based initiatives. Like *Ledis*, but often with images, the publication was based on sheets of A4 paper mailed out once a month, with updates on initiatives issued from time to time. An abstract for each *Udis* sheet was created in the information service to enable easy retrieval by members searching for particular aspects of urban regeneration.

### **The New Towns Record**



**The New Towns Record DVD**

The 32 New Towns developed in the UK since 1946 represent the most sustained programme of new town development undertaken anywhere in the world. The New Towns programme drew on the expertise and enthusiasm of a group of committed and visionary planners and architects. As well as being the driving force behind specific New Town schemes, many of these individuals became major figures in the development of late 20th century architecture, town planning and social planning in the UK. The New Towns programme offered them the opportunity to develop their approach to masterplanning in a post-war environment that was remarkably open to innovation and experimentation.

The Department of the Environment (DoE) asked the Commission for the New Towns—the successor body to the New Town Development Corporations in England—to find a way of marking the 50th anniversary of the passing of the New Towns Act 1946. The Commission consulted the Planning Exchange, which recommended that an electronic library be established to record and make available as much as possible of the documents (reports and plans) connected with the 32 New Towns across the UK, together with interviews with the planners, civil servants, politicians and others involved and as many images as appeared reasonable. Interviews conducted during the 1980s and 1990s with those directly involved in the New Towns programme offer an intriguing insight into the challenges that they faced in creating communities from scratch.

The DoE offered a grant of £200,000 to cover the English and Welsh New Towns, the Scottish Office

added a further £35,000 to cover the five Scottish New Towns, and a smaller sum was made available from Northern Ireland to cover its four New Town developments.

Relevant documents and images were scattered throughout the UK; no central collection of masterplans or other related material existed. Many of the planners and architects consulted made available documents from their private collections for scanning.

Work commenced in 1999, and documents were scanned and converted to searchable text using early optical character recognition technology. Interviews, including some with local residents, were added, along with thousands of images. The first edition was produced on CDs, and two years later it became possible to convert the material to fit onto a DVD.<sup>11</sup>

### **Seminars, conferences, and short courses**

From the start, the Planning Exchange saw the need to provide means for practitioners to learn about new developments in the law and practice of planning and its related fields, together with opportunities to share good and innovative practice. In the 1970s and 1980s there was no consistent programme of continuous professional development (CPD) in any of the relevant professions, so the Exchange pioneered courses on such matters as structure planning, development control, housing management, tenant participation, and local employment initiatives.

As time went on the range of subject coverage was broadened, with events on the provision of life-long learning, the links between social work and housing, and new developments in marine planning. Seminars and other events were designed to encourage a more interactive style of learning than in many conventional conferences, which consisted chiefly of formal presentations and lectures.

### **The extension to England**

With the full agreement of CES, the Planning Exchange was incorporated as an independent charity limited by guarantee on 14 November 1980, and its objectives were widened to cover the whole of the UK. The strap line 'Information into Intelligence' was devised to denote the essential role of the Exchange in helping organisations and authorities to find a way through the mass of information published, semi-published or unpublished across the wide field of local government generally.

Match-funding from the Scottish Office was reduced over the following years, and it was now time to widen the reach of the Exchange's services to all organisations that might find it useful across the UK (on 1 April 1986 Milton Keynes Development Corporation became the first public authority in England to become a member of the Exchange).

To that end, on 28 May 1986 the Director of the Exchange was invited to give a presentation on its economic development work to the Trustees of the Gatsby Foundation, and this led, in June 1986, to

the offer of a grant of £225,000 over three years to enable the Exchange to start to expand its operations into England and Wales. This was followed up by a grant in October 1988 of £192,000 over three years from Gatsby specifically to allow the Exchange to open a Manchester office and to continue its expansion drive in England and Wales. The latter decision was made based on evidence that, although the Exchange information services spanned the UK and abroad, its Glasgow base was perceived as making it parochial in coverage. Manchester was chosen for its position, mid-way between Liverpool and Leeds.

The Planning Exchange marked the opening of its Manchester office in March 1989 with a reception at the Museum of Science and Industry, to which John Keith, President of the Regional Plan Association of New York gave a talk. The Deputy Director of the Exchange, Linda Houston, managed the programme from Manchester and, with support from Glasgow, the initial drive was to promote membership and to demonstrate the value of shared inter-disciplinary action learning and semi-published information exchange for sustainable project delivery. None of this was common practice at the time.

In June 1990 the Gatsby Foundation provided a grant of £100,000 to the Exchange to assist Training and Enterprise Councils (TECs) in England in their work in helping small engineering firms to employ best practice management, provided the money was matched by a number of TECs. The Exchange hired John McMahon, formerly Head of Economic Development at the Irish Development Agency, to head up the programme on a consultancy basis, and four TECs signed up, which enabled McMahon and his small team to create training courses for senior managers in small engineering firms based on good practice in world-beating companies.

The Exchange went on to develop good practice information and training programmes related to the government Action for Cities initiative and City Challenge and Single Regeneration Partnerships.

In 1996 the Planning Exchange Board made the decision to close down the Manchester office, it having served its purpose of expanding membership to a good number of local authorities across England and Wales. The Exchange continued to win a number of projects from central government in England. Andrew Lean, formerly a senior civil servant at the DoE, said in 2020 that the Exchange 'promoted joined-up working long before it became fashionable and made a tremendous contribution to urban regeneration'.

### **The need for change**

In November 1996 the former Secretary of State for Scotland, Bruce Millan, was appointed Chairman of the Planning Exchange. He was quoted in the *Herald* newspaper on 20 November 1996 as stating that:

*'Today's currency is intelligence and the Planning Exchange plays a crucial role in giving ready access to information on good and innovative practice to*



*enable policy makers and practitioners to make better informed decisions on policy and strategy and so increase the effectiveness of their work.'*

In 2000 the Director submitted a paper to the Board which stated that, although the Exchange had managed, through trading its information, publication, and seminar services, to finance itself for the previous two years without grant funding, it had no working capital or assets with which to invest in development work or weather any problems that might arise with building maintenance. One particular area of activity urgently needed attention: the need to make the information service into a fully-fledged internet service which included full article downloading and enhanced searching. This was estimated to cost around £100,000, which the Exchange did not have, and so Burton went on to recommend that an investigation be made to find a suitably resourced partner who might be interested in providing funds or merging with the Exchange.

At the AGM on 19 September 2000 Edward Cunninghame took over as Chairman from Bruce Millan and immediately held a number of meetings with organisations in Scotland and London, seeking investment. In replying to a Board member expressing concern that the original purposes of the Exchange might be forgotten, the new Chairman said:

*'I would certainly like to see the Planning Exchange get into a position where it can perform the role you mentioned. However, I am concerned that the Planning Exchange is not in a financial position to do much more than keep itself solvent with its present functions at their present level. Hence, the necessity, as I see it, to enhance the commercial performance and returns of the one function that has this potential, namely the Information Service.'*

Two companies expressed interest, and in May 2002 all the assets of the Planning Exchange were sold to Idox plc, a company specialising in developing IT planning software for local authorities. The Exchange was, of course, a charity and charities cannot be sold—but their assets can, provided the proceeds are made over to the existing charity or some other. All 28 staff were offered identical employment terms with Idox, and operations remained in the same office.

The Planning Exchange charity changed its name to the Planning Exchange Foundation (PEF), and, having no staff or assets other than the proceeds of the sale, decided to make these funds available by way of research grants. Some members of the PEF Board were employees or directors of the Planning Exchange, led by Professor Peter Roberts as Chair and Tony Burton as Honorary Secretary. A website (at [www.planningexchange.foundation.org.uk](http://www.planningexchange.foundation.org.uk)) was created to give details of how grants could be applied for and to act as a depository for any reports so produced, including reports on planning and devolution, health inequalities and planning, and planning for

disaster (the lessons learned from the tsunami in Japan). The PEF also produced a website on marine planning and a documentary film on the development of Glasgow's Victorian and Edwardian townscape.

From today's perspective it is noteworthy that both the information service and SPEL continue to thrive (offered by Knowledge Exchange, the information and intelligence arm of Idox) and make a contribution to the business of Idox plc. Other services that the Planning Exchange helped to pioneer—in particular, Continuous Professional Development—are now provided as a matter of course by the professional bodies. But the need for joined-up thinking and practice has never been more pertinent in an age of climate change and pandemics.

● **Tony Burton OBE** was Director of The Planning Exchange, 1975-2002, and is Honorary Secretary of the Planning Exchange Foundation. **Linda Houston** was Deputy Director of the Exchange, **Professor Peter Roberts OBE** is Chair of the Trustees of the Planning Exchange Foundation, and **Ian Watson** was co-manager of the Information Service. The views expressed are personal.

## Notes

- 1 A report of this conference, together with other papers and Planning Exchange Board minutes, have been deposited with the Glasgow City Archives at the Mitchell Library in Glasgow
- 2 For further background on the Centre for Environmental Studies, see D Donnison: 'Pressure group for the facts'. *New Society*, 11 Dec. 1969
- 3 For more about the early years, see T Burton: 'The Planning Exchange'. *Scottish Journal of Adult Education*, 1977, Vol. 2 (4), 25–32
- 4 B White: *Planners and Information: A Report of an Investigation into Information Provision in Town and Country Planning*. Research Publication No. 3. Library Association, 1970
- 5 See the Wikipedia 'Grey knowledge' webpage, at [https://en.wikipedia.org/wiki/Grey\\_literature](https://en.wikipedia.org/wiki/Grey_literature)
- 6 See the Wikipedia 'Precision and recall' webpage, at [https://en.wikipedia.org/wiki/Precision\\_and\\_recall](https://en.wikipedia.org/wiki/Precision_and_recall)
- 7 See the 'Fair dealing' section of the UK government's 'Exceptions to copyright' guidance webpage, at [www.gov.uk/guidance/exceptions-to-copyright#fair-dealing](http://www.gov.uk/guidance/exceptions-to-copyright#fair-dealing)
- 8 Editors: Tony Burton, Eric Young and Jeremy Rowan-Robinson. Supervising Editor: AS Phillips. Production Editor: DJ Fletcher. The current editor is John Watchman
- 9 See Knowledge Exchange's 'Scottish Planning & Environmental Law' webpage, at [www.theknowledgeexchange.co.uk/products/scottish-planning-environmental-law/](http://www.theknowledgeexchange.co.uk/products/scottish-planning-environmental-law/)
- 10 The simple A4 format had been preferred to a glossy newsletter format
- 11 *The News Towns Record* on DVD has been deposited with the British Library and with the other UK Legal Deposit Libraries. See also M Hebbert: 'The New Towns Record CD-ROM by Anthony Burton; Joyce Hartley'. Review. *Town Planning Review*, 1998, Vol. 69(3); and M Clapson: 'Review of The New Towns Record, 1946-1996: 50 Years of UK New Town Development'. *H-Urban. H-Net Reviews*. Sept. 1998. [www.h-net.org/reviews/showrev.php?id=14871](http://www.h-net.org/reviews/showrev.php?id=14871)