

Reference	BOT25.FEB.14
Date	26 February 2025



THE RTPI TRUST ANNUAL ACTIVITY REPORT 2024

Background to the RTPI Trust

The RTPI Trust is a registered charity established in 1994, by members of the RTPI. It is independent of the RTPI and is governed by its own Trust Deed.

The RTPI Governance Team act as the secretariat for the Trust and the lead officer is the RTPI's Chief Operating Officer. The RTPI's Head of Finance acts as finance officer and produces the annual accounts. The RTPI finance team manage the Trust's income whether from one-off member donations through the annual subscription process, through regular direct debit payments or ad hoc gifts and bequests. The same team manage grant and bursary payments and other expenses. Further support is provided by the Education Team and Membership operations team. Information about the [RTPI Trust](#) is posted on the RTPI website and the Institute's communication channels are used to promote the work of the Trust and encourage donations.

2024 Headlines

2024	2023
Total value of hardship grants awarded £7,117 to 5 members	£13,043 to 7 members
Total value of RTPI undergrad bursaries £16,000 to 8 student members	£10,000 to 5 students
Total value of Welbank Scholarships £4,000 to 2 student members	£6,000 to 3 students
Total income* £10,949 Donations: £4,367 ⁺ (40%) Investment income: £6,582 (60%)	£9,143 Donations: £6,003 (66%) Investment income £3,140 (34%)

* Does not include investment gains

+ Does not include gift aid receivable, whereas the 2023 comparator does include gift aid.

Reference	BOT25.FEB.14
Date	26 February 2025



2024 Charitable Activity

The Trust Deed sets out the objectives of the charity as follows:

- The provision of support and financial assistance to RTPI members who are in financial hardship.
- The provision of support and financial assistance to students of town planning members who are in financial hardship.
- To undertake research for the public benefit into town planning and its social economical and financial effects on the community and into other such relevant fields of study in connection with town planning as the Trustees think fit and publish the useful results of any such research.
- The provision of support for any charitable cause associated with town planning.

2024 was another busy year for the RTPI Trust and its Trustees. During the year the activity of the RTPI Trust was as follows:

Hardship Applications

During 2024 seven applications for hardship funding were received and reviewed. This compares to nine applications in 2023. All applications were associated with financial difficulties due to ill health or unemployment. The total value of applications was £9,526 against which grants totalling £7,117 were approved by Trustees. Only two applications were rejected, because they did not meet the criteria for grants.

For a summary of all applications over the last ten years see Appendix 1.
by the Institute. Up to the end of 2024 two grants have been made from this fund.

Bursary Schemes

The Trust runs two student bursary schemes:

1. [RTPI Trust Undergraduate Bursaries](#)

In 2017 The Trust set up a bursary scheme for students at accredited planning schools in the UK and Ireland, with the aim of promoting and supporting widening access to, and diversity, within the planning profession. These bursaries each have a value of £2,000 and it was anticipated that each year around four bursaries would be awarded.

In 2024 a record 43 applications were received from students at twelve UK and Ireland planning schools. Applications were assessed by Trustees, and it was agreed to make eight awards altogether, one each from Sheffield, Leeds, Manchester, Dundee and Herriot Watt and three to students from Newcastle University.

<i>Reference</i>	BOT25.FEB.14
<i>Date</i>	26 February 2025



2. The Michael Welbank and Trust Bursary

In 2021, the Trust received a generous bequest from the estate of the former President and founding trustee of the RTPI Trust, Michael Welbank and it was agreed with Michael's family that a bursary should be established for students at accredited planning schools in London (UCL, Westminster and LSBU) to the value of £2,000 each. In 2024 four applications were received from students at two of the three London Planning schools and the Trustees agreed to award bursaries to one student from LSBU and one student from UCL. No applications were received from students at Westminster.

In total six of the ten bursaries awards were to female applicants and four to male. Four of the successful applicants had a disability. Four of the applicants were of non-white ethnicity.

Other Funding Activity

In 2023 Trustees received a request to support funding for displaced planners, an initiative based on the needs of planners displaced due to the conflict in Ukraine. Trustees agreed to support this request with funding and a grant of £20,000 was made available to support all displaced planners. The fund is managed from the Chief Executive's office through a restricted fund held

Governance

The Trust Deed limits the number of Trustees to five. Appointment of Trustees is a matter for the RTPI Trust Board.

During 2024 the Trustees were:

- John Acres – Chair
- Vincent Goodstadt
- Joanna Chambers
- Janet Askew
- Ian Tant

There has been an agreement to adopt fixed three year terms of service. Trustees who have served more than six years are expected to stand down. Accordingly at the end of the year, Vincent Goodstadt stood down and the RTPI Trustees agreed at the Board meeting on 11 December 2024 to appoint Sue Bridge as his replacement. Sue will serve a three-year term, renewable once, starting on 1 January 2025. The Trustees acknowledged the significant contribution Vincent has made over many years and thanked him for his tireless work and support at the General Assembly meeting on 22 January 2025.

The Trustees had five formal meetings during the year but also met on other occasions to consider hardship applications.

At the meeting in May 2024, the Trustees received a report from the auditors and approved the annual accounts for the year ending 31 December 2023. At the end of the 2023 financial year the

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Trust had funds of **£326,357** (prior year £300,127). Despite the higher expenditure on grants this year, income has remained strong and investment returns improved. Total funds are therefore expected to remain broadly the same. In light of the closure of the main investment fund Trustees agreed to transfer investment funds to new providers during the year and this change has taken place. Trustees monitor investment returns to ensure performance meets expectations.

During the year the Trustees have worked on improvements to the governance of the Trust. The following new governance documents were agreed by Trustees:

Trust Regulations – the Trust Deed is silent on many aspects of charity governance and these regulations support the management of the Trust in line with the approaches and standards now demanded by the regulator, the Charity Commission.

Privacy Policy – the Trust collects, processes and stores personal data and have adopted a privacy policy in line with data protection regulations. Changes have been made to the application form to ensure applicants understand and agree to the use of their personal data.

Guidelines for Agreeing Grants – the work on providing support for the decision-making process in assessing and agreeing grants has started and will be completed early in 2024.

Trustee job description – setting out the skills and competencies required, the main elements of the role and duties and behaviours expected of Trustees.

A risk register has also been drafted and will be approved and adopted early in the new year.

The Trustees have also agreed to work on the following resources to support good governance:

- RTPI Trust Strategic Plan
- Trustee Code of Conduct
- Reserves and Investment Policy
- Scheme of Delegation for Non-Reserved Matters
- Statement on Equality Diversity and Inclusion
- Safeguarding policy