



RTPI

Royal Town Planning Institute

Associate Membership

Main Guidance

Partial professional membership qualification

Published June 2019



This guidance is applicable to Associate membership candidates submitting their application for the first time from January 2020.

It replaces Associate membership guidance published in June 2016.

Your application will be rejected or deferred if you fail to comply with this document.

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1. General information

1.1 Associate membership (AssocRTPI)

The Royal Town Planning Institute's (RTPI) vision for planning is as an inclusive activity encompassing far more than traditional statutory land-use planning. A diverse range of professionals contribute to furthering this planning agenda, both in the UK and overseas. Associate membership is designed to engage with and offer recognition for these individuals.

Associates are members of an institute whose charitable purpose is to advance the science and art of planning for the benefit of the public, and share those values.

QUALIFYING AS AN ASSOCIATE

Associate membership is a partial professional qualification, awarded in recognition of achievement and demonstrable involvement in, or engagement with, particular areas of planning. Associate membership therefore indicates that you have achieved a certain level of knowledge and experience in your chosen planning field. Associate Members use the designation AssocRTPI to denote their status.

YOUR RESPONSIBILITIES AS AN ASSOCIATE

As an Associate, you must abide by the RTPI Code of Professional Conduct (available at www.rtpi.org.uk/professionalstandards). This provides confidence that you uphold high professional standards within your field of planning.

You are also required to undertake Continuing Professional Development (CPD) activity in accordance with the RTPI requirements. You are therefore committed to maintaining and developing your professional competence throughout your career, supported by the RTPI.

1.2 Elements of the Associate written submission

The application process for Associate membership follows a similar structure to the Assessment of Professional Competence (APC), in that it includes a written submission of three sections:

- 1. Practical Experience Statement (PES).** The PES is an **overview statement**, which sets out what **relevant experience** you have gained to meet the eligibility requirements.
- 2. Professional Competence Statement (PCS).** The PCS is an **analytical statement** where you use case studies to demonstrate the competencies you have developed through your experience. The competencies require you to focus on **learning gained** through **observation** and **practice**.
- 3. Professional Development Plan (PDP).** The PDP is a **detailed plan**, which identifies and sets out how you are going to meet your personal professional development needs over the two years after your submission. It answers the important question: **what next?**

1.3 What do you submit?

Your application **must** consist of the following:

CORE DOCUMENTS

- **Written submission** of 4,000 words (+/- 10%) comprising three sections:
 - (1) Practical Experience Statement (PES) of approximately 1,000 words.
 - (2) Professional Competence Statement (PCS) of approximately 1,500 words.
 - (3) Professional Development Plan (PDP) of approximately 1,500 words¹.

SUPPORTING DOCUMENTS

- **Corroborator Declaration Form(s)** which cover **all** work experience in the application.
- **Sponsor Declaration Form** completed by a Chartered Town Planner.
- Scanned copies of any **relevant degree certificates, academic transcripts** or **apprenticeship completion certificate** (for educational backgrounds a, c or d²).

EDUCATIONAL BACKGROUND B CANDIDATES ONLY³

- **Planning Degree Statement (PDS) and Matrix** of up to **1,000 words**.
- **Relevant academic transcripts**.

Your contact details, education history and work experience information will also be submitted as part of your application.

Find out how to submit and relevant **submission deadlines** at: www.rtpi.org.uk/membership-submit.

If any of your documents are in a language other than English, you will need to provide a certified translation.

1.4 How is your application assessed?

When we receive your application:

1. **Pre-assessment checks are completed:** These checks ensure you have submitted all relevant documentation, are within the word limit, and meet the basic eligibility criteria. Your application may be delayed or rejected if everything is not included, or your fee has not been paid, so please ensure you also undertake the checks yourself prior to submission.
2. **Two trained assessors receive your application:** They will consider whether you have demonstrated all the competencies and whether you have acquired the appropriate knowledge, skills and reflective practices to be elected to membership.

¹ The RTPI provides a template for the PDP which is compulsory to use at: www.rtpi.org.uk/associate-resources. When calculating your word count, you should only count words which **you** add to the template.

² See [section 2.2](#) for an explanation of educational backgrounds.

³ See [section 2.2](#) for an explanation of educational backgrounds.

- 3. Assessors review your application:** They do this independently of each other and then arrange to confer and agree on a recommendation as to whether you have met the requirements.
- 4. Assessors complete a feedback report:** This details the outcome of the assessment and makes a recommendation as to whether you have demonstrated the requirements to become a Chartered Town Planner. You are formally assessed on the PES, PCS, PDP and general presentation.
- 5. Post-assessment checks are completed:** These checks review the assessors' feedback report to ensure that due process has taken place.
- 6. You are notified of the assessment outcome.**

1.5 Assessment outcomes

There are three possible assessment outcomes – successful, deferral or rejection.

- A **successful** outcome means you have demonstrated all of the requirements. If you are successful, you will be elected to the relevant membership grade. You may be referred to a PDP support phase if there were weaknesses identified in the PDP, for further details see: www.rtpi.org.uk/pdp-support-phase.
- A **deferral** means that you have not yet met some or all of the requirements. This is not a fail. You are being asked to provide additional information to demonstrate the relevant requirements.
- A submission can be **rejected**, but only if your experience, demonstrated in the PES, is short of the experience requirements by two years or more⁴. In this instance, the assessors cannot reject your application on the first attempt; they must **defer your application at least once** and give you the opportunity to clarify your experience in a resubmission. Your submission cannot be rejected solely on the PCS and / or PDP. If the PCS and / or PDP do not meet the requirements, the submission will be deferred (see above).

You will receive a feedback report with your results. The report has a summary of your results on the front page, with assessor comments on each of the three parts of the written submission separately, as well as general presentation.

1.6 Resubmission and appeal

If you have not met the requirements you will be asked to either resubmit the full section or provide a supplementary statement. Any resubmission can be made up to **two years from the date of your first submission** (resubmission fees apply). After this period you will have to submit a new application which will be assessed in its entirety by new assessors; the new application would need to comply with guidance in place at that time.

Further details about resubmission are available at: www.rtpi.org.uk/resubmissions. **Resubmission deadlines** can be found at: www.rtpi.org.uk/membership-submit.

⁴ See [section 1.6](#) – you have up to two years from the date of your first submission to gain more experience.

If you feel due process has not been followed in the assessment of your application, you have a right of appeal but only after at least one resubmission attempt to address the unsuccessful elements. An appeal must be submitted in accordance with the Membership Appeal Procedure available at: www.rtpi.org.uk/membershipappealprocedure. For any queries about appeals and the process, please contact the Membership Team on +44(0)20 7929 9462.

1.7 Tips for success

- 1. Read this guidance:** this guidance is the key to your success – read it thoroughly several times, prior to preparing your submission.
- 2. Use the resources available to you:** speak to other professionals and colleagues, find a mentor, attend RTPI membership events and access online resources through the RTPI website: www.rtpi.org.uk/associate.
- 3. Competency criteria are the key:** have you sufficiently addressed each competency in your submission? A checklist is available on the RTPI website to help you.
- 4. Select your case studies carefully:** choose case studies that were challenging or interesting. You do not have to choose the biggest, most impressive project you have worked on.
- 5. Spend time on your PDP:** a detailed plan for your future development is needed. Refer to the PDP checklist⁵ to make sure you meet all of the requirements.
- 6. Prepare:** do not leave your submission until the last minute before the deadline, and allow your mentor, manager or colleagues time to review your application.
- 7. Review your submission:** give it to someone who has never read it before. It is not unusual for people who are familiar with your work and your projects to read more into the text than is on the page. Remember, the assessors will only read what is presented and bring no prior knowledge of you to the process.
- 8. Check the presentation and formatting:** have you presented your submission in accordance with the details in the guidance, including the word counts? Make sure your Corroborator Form(s) are clearly labelled so the assessors can easily identify what they are looking for.

⁵ See [section 5.9](#) of this guidance.

2. Eligibility and experience

2.1 Who is Associate membership for?

Eligible experience for Associate membership encompasses traditional land-use planning functions, but extends far beyond to include a wide range of professionals involved in shaping the natural and built environment.

The RTPI recognises that candidates for Associate membership come from a variety of professional backgrounds. Candidates may be working in related disciplines engaging with planning including, but not limited to:

- Regeneration
- Economic development
- Urban design
- Water and environmental management
- Conservation, heritage and archaeology
- Environmental and sustainability assessment
- Property development
- Environmental protection

Alternatively candidates may have qualified initially in another profession but have also been gaining experience in planning. For example, candidates from:

- Architecture
- Construction
- Surveying
- Engineering
- Housing and housing management
- Land reclamation
- Landscape architecture
- Leisure, recreation and tourism

Associate membership is also likely to appeal to candidates working in planning but who do not have a fully RTPI accredited degree and do not yet have the experience for Chartered membership. These candidates may therefore be engaged in 'core' planning functions such as:

- Development control/management
- Planning policy or strategic planning
- Community development, planning and involvement
- Planning enforcement
- Minerals and waste planning
- Masterplanning
- Transport planning

Are you a planning law specialist?

You may be eligible to join our specialist Legal Associate class instead, see:
www.rtpi.org.uk/legal-associate.

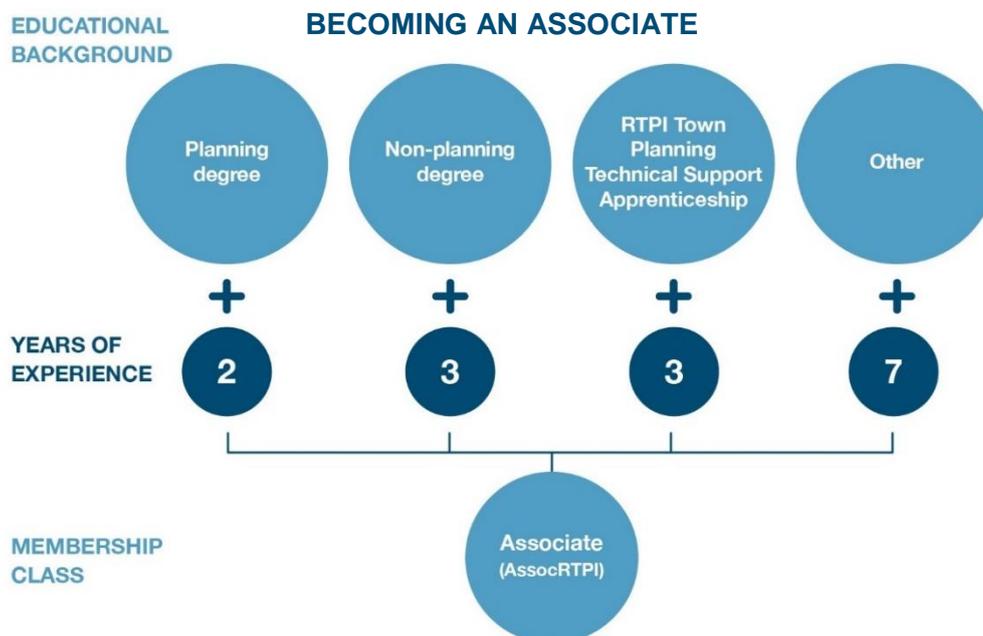
2.2 Are you eligible?

To be eligible to submit your Associate membership application:

- You **must** have a minimum of **2-7 years' experience⁶ engaged with planning** (full-time equivalent). The exact amount required varies according to your educational background and qualification, as shown in Table 1.
- Up to **1 year of this experience** may have been gained before completing the relevant qualification (for **educational backgrounds a-d** in Table 1); the remainder must be gained after the qualification.

TABLE 1 – EDUCATIONAL BACKGROUNDS FOR ASSOCIATE MEMBERSHIP

Educational background	Experience required
a. Planning degree (partially RTPI accredited ⁷)	2 years
b. Planning degree (non-RTPI accredited)	2 years
c. Non-planning degree	3 years
d. RTPI Town Planning Technical Support Apprenticeship	3 years
e. Other	7 years



Should I apply through the Licentiate or Associate route?

If you have a fully RTPI accredited qualification, you are eligible for and must follow the separate Licentiate Assessment of Professional Competence (L-APC) route to Chartered membership: www.rtpi.org.uk/l-apc. You **cannot** apply for Associate membership.

⁶ See [section 2.4](#), [section 2.5](#) and [section 2.6](#) for experience requirements.

⁷ Find out if you have a partially RTPI accredited qualification at: www.rtpi.org.uk/accredited-qualifications.

2.3 Associate route to Chartered membership

Associate membership offers a stepping stone on the route to becoming a Chartered Town Planner. Associates have the opportunity to progress to Chartered membership through the Associate Assessment of Professional Competence (A-APC). Full details on this route can be found at: www.rtpi.org.uk/a-apc.

2.4 'Engaging' with planning

Assessors will be looking at how your experience engages with planning. You should be able to show a working understanding of the elements of the planning system with which you are engaged and demonstrate how your area of work engages with planning.

If you are not directly involved in 'core' planning functions you must demonstrate that your work engages with planning. You should not be working in isolation, but engaging with planners. For example, if you have a background in regeneration you might demonstrate how you have worked with planners to see how some parts of a regeneration strategy became part of planning policy.

2.5 Does your experience qualify?

Your experience might include being engaged with the following aspects of planning. Please note that this is a non-exhaustive list of the broad types of work included as planning and candidates **do not** require experience in **all** these areas:

THE PREPARATION OF PLANS, POLICIES AND RELATED DOCUMENTS, SUCH AS:

- development briefs, design guides, environmental, economic and traffic impact assessments;
- sustainability appraisal, transportation and economic assessments and travel plans;
- associated processes of economic development, viability assessments, community engagement, preparation of materials for inquiry, advocacy and presentations to clients, which are regarded as integral to plan preparation;
- landscape / biodiversity assessments and appraisals;
- spatial development strategies and statutory development plans as well as master, town, village / parish settlement and conservation plans for buildings, urban areas and the countryside.

PLAN IMPLEMENTATION, SUCH AS:

- implementation of plans or schemes for conservation, environmental improvement, economic development, urban regeneration, traffic and transportation, tourism, minerals, waste disposal, or derelict land reclamation, including funding and delivery options;
- planning involvement in housing and housing management, community development, environmental education and recreation, and urban design;
- site appraisal, feasibility studies, scoping exercises and all forms of study preparatory to the submission of a planning application;
- experience gained from involvement in investigation, negotiation and resolution of breaches of planning control, preparation of notices, handling of enforcement appeals and court proceedings.

MONITORING AND RESEARCH, SUCH AS:

- research and analysis of information leading to the making of planning policy or planning recommendations and decisions;
- funded research for clients from the public / private / voluntary sectors;
- monitoring of plans and policies leading to reports and plan revision;
- planning submissions, or research appraisal.

ACADEMIC PRACTICE, SUCH AS:

This includes higher education teaching experience linked with the types of activity described in paragraphs above and takes place on courses related to planning. It also includes academic research (funded and non-funded) and publication.

Relevant research undertaken towards a PhD qualification can count as relevant experience. Assessors will consider the prime purpose of the research; the stage of the research and the organisational context of the research.

The RTPI welcomes candidates who are engaged in teaching and / or academic research in an area of planning, and has produced a specific advice note with content shaped and reviewed by academics who have already achieved RTPI membership. It provides targeted guidance on using research and teaching experience in membership submissions. The Academic Experience Advice Note is available at: www.rtpi.org.uk/associate.

2.6 Calculating your relevant experience

The table below outlines the types of experience that can and cannot count towards the application.

TABLE 2 – COUNTING YOUR EXPERIENCE

Experience type	Can it count?
Full- or part-time experience. To calculate part-time experience you need to pro rata your part-time hours against the 35 hour week. ⁸	Yes
Paid or voluntary experience.	Yes
Experience gained in the UK or overseas.	Yes
Experience that is non-consecutive. Breaks in employment for parental leave, redundancy or travelling are fine. They just need to be excluded from your overall planning experience.	Yes
Experience gained whilst on a sandwich year or vacation placement. Please note that, in some cases, such work may not be of a professional level and therefore may be discounted.	Yes
Experience gained whilst self-employed. As long as you can demonstrate a consistent period of planning experience.	Yes

⁸ To ensure that experience is gained over a sustained period, candidates can only claim a **maximum** of 35 hours relevant experience each week. If you work more than 35 hours a week, you **cannot** pro rata this experience to exceed the full-time requirement.

Experience type	Can it count?
Experience gained prior to completing your educational qualification. Up to 1 year of your experience may be gained prior to completing your educational qualification ⁹ .	Yes
Experience gained whilst studying. (See exception below.)	Yes
Experience gained whilst studying a 1-year fully RTPI accredited qualification¹⁰. For example, if you commenced this qualification on 1 September 2020, you would be able to start counting experience gained from 1 September 2021.	No
Experience less than three months in duration (full-time equivalent).	No
Administrative experience or technical support experience. Experience must be of the relevant level.	No
Experience gained as an elected member or politician. You cannot count experience gained as an elected member, though such experience may help you to appreciate the context within which you operate.	No

How do you calculate part-time or partially relevant experience?

If your experience was not full-time or not fully relevant, you must demonstrate how you calculated your eligibility. For example, if you have 36 months of 28 hours a week, you would state:

- 36 months at 80% of a full-time role is equivalent to 28.8 months' full-time work.

If you worked in a role that was 40% planning and 60% non-planning for 12 months, then did six months' full-time planning, you would state:

- 12 months at 40% of a full-time role is equivalent to 4.8 months' full-time work. Plus 6 months' full-time work.

Total: 10.8 months

⁹ As set out in a-d in Table 1 of [section 2.2](#).

¹⁰ To find out more about RTPI course accreditation, see: www.rtpi.org.uk/accredited-qualifications.

3. Written submission: Practical Experience Statement (PES)

3.1 What is the PES?

The PES is the first section of the written submission, and is an overview statement which sets out what **relevant experience** you have gained to meet the eligibility requirements. It should also provide the assessors with enough information to understand the context within which you work.

The relevant employer(s) or supervisor(s) must corroborate¹¹ all experience within the PES.

3.2 Scope and structure

The PES **must** refer to the relevant experience you have gained over the time required. It must be current up to a month prior to submission (though you do not necessarily need to be working in planning when submitting your application¹²).

It is recommended that the PES be structured in chronological order, role by role, to provide comprehensive coverage of your experience to date.

For each position you have held, the PES **must** include:

- the name and type of employer e.g. public sector, private sector, academia;
- the nature of the organisation (mainstream planning, local planning authority, multi-disciplinary practice, educational institution etc.);
- your own job description: a summary of the main role and responsibilities, including any line management responsibility;
- the nature of the work you undertook in the role; and
- dates and time periods covered.

It is also helpful to provide information on the size of the organisation and where you sit within the organisational structure, but this is not a requirement.

What if I have achieved more?

If you exceed the minimum experience requirements, you are encouraged to demonstrate this additional experience within the PES as long as it is supported by a Corroborator Declaration Form.

¹¹ See [section 8.3](#).

¹² See [section 3.5](#) for how to address gaps in your experience in the PES.

3.3 Articulating your role

The PES is a factual account of your **own** professional responsibilities and an overview of your experience; it does not need to focus on competencies. Where you have been involved in group tasks or projects, you must describe how you personally contributed to the project as a whole. It is not necessarily expected that you will have been managing entire projects or been involved in a project in its entirety. Some projects you have been involved in may not have reached completion when you are finalising your submission.

You need to describe how your role engaged with planning. If your job has changed or evolved within a single organisation over the period of practical experience, you should clearly indicate this.

Finding it difficult to explain your experience?

Make use of bullet points, tables and / or a timeline to present your experience clearly.

If you gained some of your experience in areas that were not solely planning related, you need to estimate and clearly set out the **proportion** of your time that was devoted to planning responsibilities (see [section 2.6](#) for how to calculate relevant experience).

3.4 Avoiding common mistakes

The assessors will use this part of the submission to determine whether you have the right amount and type of experience. Assessors may disregard parts of your experience if:

- you only describe the function of your organisation or department rather than the work you have done; or
- you have described roles that are predominantly administrative or managerial and not planning; or
- they are not convinced you have gained the minimum amount of relevant experience; or
- they have difficulty identifying what part of the work outlined was done by you.

If you are concerned that your experience is not sufficiently robust to meet the minimum requirements, you may prefer to gain more experience before you submit¹³.

3.5 Gaps in your experience

Should you have gaps in your periods of eligible experience, for example due to extended or parental leave or a career break, which are greater than normal annual leave or sickness entitlements, these periods should be excluded from the experience period presented and not included in the calculation of experience.

You should briefly explain any gaps in your experience within your PES.

¹³ See [section 2](#) for experience requirements.

4. Written submission: Professional Competence Statement (PCS)

4.1 What is the PCS?

The PCS is the second section of the written submission, and is an **analytical statement** where you use case studies to reflect on competencies you have developed through your experience. Overall, you must demonstrate all competency criteria to be successful on this section.

The relevant employer(s) or supervisor(s) must corroborate¹⁴ all experience within the PCS.

4.2 Scope and structure

In the PCS you need to show that you have gained a working knowledge of the planning system through your observation and practice.

Your PCS will be assessed against **7 competencies** which are all equally important. The competencies are interrelated and linked to one another. You are required to select **1 to 2 case studies**¹⁵ from your experience to demonstrate **all competencies** at the **appropriate level**.

EVIDENCE TYPES FOR COMPETENCIES – AWARENESS TO CORE

A minimum type of evidence is required for each competency, however, if you have experienced more in your career you are encouraged to demonstrate this.

The types of evidence range from Awareness to Core and are defined in this section. Application level is not required for candidates applying to Associate membership, but the definition has been provided so that you can benchmark your experience.

The criteria for Core competencies need to be demonstrated throughout all case studies you present, unless indicated next to the specific criterion. Application, Understanding and Awareness competency criteria only need to be demonstrated in sufficient detail within one case study to be successful.

¹⁴ See [section 8.3](#).

¹⁵ For information on how to structure case studies, see [section 4.3](#) and [section 4.4](#).

1. Awareness (Recognise): Appreciate the principles of the competency recognising they have implications for your case study.

- **How do I know if I have reached Awareness?** I know how planners are expected to operate in their professional capacity.... I can recognise good practice....

2. Understanding (Explain): Explain specific implications of the competency for your case study, which could be an observed or hypothetical scenario.

- **How do I know if I have reached Understanding?** I can explain how a planner should operate in their professional capacity..... I can explain what good practice looks like...

3. Application (Do): Demonstrate how you have applied the competency through your case study (not required for Associate membership; only required for Chartered and Legal Associate membership)

- **How do I know if I have reached Application?** I operate in a professional way in my practice..... I use my understanding of professional practice to guide my actions...

4. Core (Behave): Demonstrate repeated application of the competency through your case study and practice.

- **How do I know if I have reached Core?** I consistently behave in a professional way in my practice, in a range of situations, some of which are challenging and unpredictable... I use my knowledge and experience from similar situations to inform and guide my actions in new and unfamiliar situations...



HOW TO READ THE COMPETENCIES

Each competency is structured in three parts as follows:

- **Descriptor:** defines the competency and its relevance to the planning profession.
- **Criteria:** sets out the minimum standards you **must** meet to achieve success with the competency. Failure to demonstrate **even one criterion** means your application will be unsuccessful. There are between one and five criteria per competency.
- **Examples:** provides examples of how the competency **could** be demonstrated at the relevant Awareness, Understanding, Application or Core evidence type. The examples provided are **purely indicative** of how whole or partial criterion / criteria might be demonstrated within a competency – they are not an exhaustive list. Using these examples does not guarantee your success; you are encouraged to consider the examples within the wider context of your case studies and experience.

TABLE 3 – COMPETENCIES FOR ASSOCIATE

Competency	Evidence type
C1 Professional ethics and the RTPI Code of Conduct	Core
C2 Spatial planning context	Understanding
C7 Legal framework	Awareness
C8 Politics in planning	Awareness
C9 Economics in planning	Awareness
C10 Reflection and review	Understanding
C11 Sustainability and climate change	Awareness

Do not use the competencies as sub-headings

The competencies are interrelated and describe what you would do to manage an activity within the planning environment. You must therefore use case studies to demonstrate them, rather than a short example for each. The PCS should not be structured with the competencies as sub-headings.

For detailed information on each competency, see [C1 – C2](#) and [C7 – C11](#).

C1 Professional ethics and the RTPI Code of Conduct (Core)

DESCRIPTOR

Members must demonstrate their commitment to the RTPI's Code of Professional Conduct¹⁶. Its five core principles relate to:

- Competence, honesty and integrity
- Independent professional judgement
- Due care and diligence
- Equality and respect
- Professional behaviour

Professionals must liaise and cooperate effectively with others and may need to use different communication methods tailored to their audience. Negotiation, mediation, influence and advocacy are also key attributes.

Ethical behaviour underpins the five core principles of the RTPI Code of Professional Conduct but it is important to recognise that ethics can go beyond the requirements of law and regulation. To build trust in the profession, it is vital to behave in an appropriate manner, to recognise right from wrong, and to be able to reflect on society's expectations of planning practice.

CRITERIA

In your PCS, **you must**:

- a. Demonstrate professional behaviour, in line with the principles outlined in the RTPI Code of Professional Conduct (**required throughout PCS**); **and**
- b. Reference a **specific clause** of the RTPI Code of Professional Conduct **and** show how you complied with it (**required once in PCS**); **and**
- c. Reflect on **how** your action has minimised reputational risk to the profession, and **why** this built trust in the profession (**required once in PCS**).

EXAMPLES OF COMPETENCY C1 AT <u>CORE</u> EVIDENCE TYPE	COULD DEMONSTRATE CRITERIA
Show how you navigated difficult professional situations and reflect on why you believe you followed an appropriate approach. Situations could include; a request to represent the council at an appeal following a refusal against your recommendation, standing by your professional judgement when under challenge, or reflecting on the approach you take when a client insists you follow a particular course of action that goes against your advice.	a, c

¹⁶ The RTPI Code of Professional Conduct is available at: www.rtpi.org.uk/professionalstandards.

EXAMPLES OF COMPETENCY C1 AT <u>CORE</u> EVIDENCE TYPE	COULD DEMONSTRATE CRITERIA
Reflect on how you dealt with a real or perceived conflict of interest and why it was or was not appropriate to continue with the task.	a, c
Consider how and why you took an informed and balanced approach in a situation which presented moral tensions.	a, c
Reflect on the steps you took to ensure sensitive information was not inappropriately disclosed and why it was important for you to act.	a, c
Evidence how you have managed pressures from stakeholders; or reflect on how you dealt with personal criticism when undertaking work.	a, c
Reflect on how you dealt with the provision of gifts by clients, consultants or other stakeholders.	a, c
Evidence your compliance with relevant employer procedures in relation to behavioural standards.	a
Show through action how you have acted professionally within your case study.	a
Explain the steps you took to guard against the abuse of elected officials' interests and reflect on why you took the relevant action.	a
Demonstrate quality customer, stakeholder or client care when faced with challenge.	a
Refer to a specific clause of the RTPI Code of Professional Conduct and explain what you did. Clauses cover areas such as; exercising independent and impartial professional judgement, conflicts of interest, disclosure, issues of discrimination, setting out fees.	b
Reflect on how you acted to help safeguard the profession or the public and the consequences if you had not taken action.	c

Top tips for this competency

#1 Criterion (b) requires reference to a **specific clause** of the RTPI Code of Professional Conduct. Your application will be deferred if you fail to do this, or do so without explaining the context and its implications i.e. how it impacted on your course of action.

#2 For criterion (c) you should consider how your actions look from the outside and whether you are acting in the public interest. Historically, acting in the public interest has been defined in terms of protecting public health, public amenity and the environment from 'harm'. Nowadays RTPI Members serve a range of interests. Acting in the public interest involves having regard to the expectations of clients, employers, the local community and politicians as well as future generations (RTPI Practice Advice: Ethics and Professional Standards, 2017).

C2 Spatial planning context (Understanding)

DESCRIPTOR

The work planners do will impact on other professionals, have wider spatial implications and will affect a number of stakeholders. Professional planners need to have an understanding of the broader environment in which they work and an appreciation of the frameworks within which they operate. Planners also need to understand the inter-relationships that operate across national, regional, sub-regional and local spatial scales; as well as an ability to focus on site specific issues where appropriate.

Spatial planning (i.e. managing competing uses for space and creating places valued by people) embraces regeneration, urban design, community or neighbourhood planning, transport planning, environmental planning, economic development and many more specialist planning activities.

CRITERIA

In your case study, you **must**:

- a. Set out the policy context and other relevant background information; **and**
- b. Explain which stakeholders were involved and why.

EXAMPLES OF COMPETENCY C2 AT <u>UNDERSTANDING</u> EVIDENCE TYPE	COULD DEMONSTRATE CRITERIA
Describe the physical setting of a site in relation to its surroundings and outline the policy context.	a, b
Identify stakeholders and explain their role.	b
Explain how community input, or specific consultee input, affected the planning approach.	b

C7 Legal framework (Awareness)

DESCRIPTOR

Planning operates in a highly regulated environment. Over time, there have been different proposals for reform to planning in different administrations within the UK and beyond. However, even when Planning Acts have been passed, it is often the case that changes happen on an incremental basis, such as when legal judgements are made by the courts and secondary legislation is made or amended. Beyond the national level, international treaties and agreements can also affect planning. A successful planner must therefore ensure they have a good understanding of the relevant legal framework which underpins planning.

CRITERIA

In your case study, **you must:**

- a. Identify legislation that is relevant to planning; **and**
- b. Describe how the legal system operates **or** is structured within your professional context.

EXAMPLES OF COMPETENCY C7 AT <u>AWARENESS</u> EVIDENCE TYPE	COULD DEMONSTRATE CRITERIA
Show basic knowledge of relevant legislation such as; statutory timeframes, application submission requirements and fees, or other legislation.	a, b
Appreciate the purpose of legislation in achieving planning outcomes.	a, b
Show appreciation of the legal status of planning consents and / or enforcement of conditions.	b

C8 Politics in planning (Awareness)

DESCRIPTOR

The planning process and planning decisions often come under scrutiny, nationally and locally in the UK and abroad, on account of the level and range of impact and what it can achieve. New jobs, additional housing, or an alternative use for a plot of land whose openness is valued by members of a community are examples of this.

Whilst professional planners apply technical skills to inform judgements, ultimately, they have to balance a range of conflicting demands in the use of land, including differences between varying public opinions and the political influence that this brings. Consequently, any practitioner involved in planning should see the need for a clear and ongoing appreciation of the political system in which planning operates and the potential for politics to influence different outcomes.

CRITERION

In your case study, **you must:**

- a. Reflect on the political context within which planners operate.

EXAMPLES OF COMPETENCY C8 AT <u>AWARENESS</u> EVIDENCE TYPE	COULD DEMONSTRATE CRITERIA
Discuss in the case study why engagement with elected officials may be necessary.	a
Explain how a planning committee operates and its role.	a
Discuss why elected officials may have overturned planners' recommendations in your case study.	a
Describe how a council's scheme of delegation or governance could affect the process / outcome of an application.	a

C9 Economics in planning (Awareness)

DESCRIPTOR

In order to deliver social and environmental objectives, the 21st century planner needs to understand the economic context of planning decisions. Professional planners need to recognise the range of ways in which they can add value to development activity and other planning decisions. Planners thus use their knowledge of how markets operate, including the economics and financing of development, to ensure that development adds value by being economically sustainable.

The financial implications for public, private and other sectors thus need to be taken into account to avoid raising local expectations or forming unachievable planning strategies; and to maximise the value from investments whilst balancing this against wider sustainability objectives. This is not the same as always being 'pro-development' or prioritising development interests. The ultimate aim should be to generate added value for the whole community by looking at the long term contribution of planning options as well as at their immediate impacts.

CRITERION

In your case study, **you must:**

- a. Highlight the importance of economics in planning.

EXAMPLES OF COMPETENCY C9 AT <u>AWARENESS</u> EVIDENCE TYPE	COULD DEMONSTRATE CRITERIA
Comment on some of the issues that may affect development viability.	a
Recognise how different demands from the planning process (such as planning policies, design aspirations or local constraints) can affect the economic viability of development. (<i>could demonstrate criterion a</i>)	a
Consider how economics in planning can generate added value for the community and / or environment. (<i>could demonstrate criterion a</i>)	a

Top tip for this competency

This competency is about economics *within* the planning process – not service or budget cuts within the planning profession.

C10 Reflection and review (Understanding)

DESCRIPTOR

Reflective practice is a distinguishing feature of a professional and is defined as “the capacity to reflect on action so as to engage in a process of continuous learning”¹⁷. A process of reflection and review ensures that professionals evaluate their work outcomes, are aware of how their work can be affected by external changes; and use that reflection to influence the success of future practice. It also means taking a critical look at your own learning as well as performance. The RTPI requires members to regularly reflect on learning through the Code of Professional Conduct and its continuing professional development (CPD) requirements.

CRITERIA

In your case study, **you must**:

- a. Reflect on what went well and how your performance could be improved; **and**
- b. Identify your areas for professional development of knowledge or skills.

EXAMPLES OF COMPETENCY C10 AT <u>UNDERSTANDING</u> EVIDENCE TYPE	COULD DEMONSTRATE CRITERIA
Reflect on the role that planners played in your case study and what could be improved such as; recognising that there may be other strategies or information which could have been used to achieve a better planning outcome.	a
Reflect on your areas for development such as; the need to develop your stakeholder management skills, improve your knowledge of specific policies or increase your understanding of project management.	b

Top tip for this competency

Any weaknesses in your skills or knowledge highlighted in the PCS will need to be drawn through to the PDP.

¹⁷ Schon, D., (1983). The Reflective Practitioner. Basic Books: New York.

C11 Sustainability and climate change (Awareness)

DESCRIPTOR

Sustainability seeks to balance economic, environmental and social dimensions and planners need to understand and take into account all three. Planning plays a key role in promoting social and economic development, while conserving environmental, social, cultural or heritage assets for future generations.

Planners need to understand the implications of climate change for places on a global scale, and how planning is critical in responding to these challenges (such as the climate hazards an area may face, and their social and economic costs and consequences). Better mitigation and adaptation to climate change is essential for a sustainable economy and society, and planning has a crucial role to play in securing this, including responding to any potential opportunities of a changing climate.

CRITERIA

In your case study, you **must**:

- a. Explain the importance of balancing the three dimensions of sustainability through the planning process; **and**
- b. Highlight the importance of climate change for planning.

EXAMPLES OF COMPETENCY C11 AT <u>AWARENESS</u> EVIDENCE TYPE	COULD DEMONSTRATE CRITERIA
Define sustainability and its relevance to your case study.	a
Describe issues that can be taken into account to determine sustainability of development proposals such as; modes of transport, creation of job or training opportunities, enhanced air or environmental quality, improvement to open space or access to community facilities to improve health.	a
Describe what planning can do to reduce carbon or other greenhouse gas emissions at strategic, regional, local / neighbourhood or site specific levels.	b

4.3 Selecting case studies

WHAT IS A CASE STUDY?

A case study is an example of work which you have been a part of – it must allow you to drill down into the details of your practice. A case study will therefore focus on a **specific** application, proposal, scheme, policy document, research report or project. If the project was of a large scale, you may wish to focus on **one aspect, stage or phase** of the project as your case study.

Selecting an area of work or a process e.g. ‘appeals’, ‘planning applications’ or ‘research programme’ is usually too broad. Instead, you are advised to focus on a specific appeal, application or piece of research.

What if the project is unfinished?

You can use a project that is unfinished or undetermined as your case study if you feel it best demonstrates the competencies. Within the case study, let your assessors know what stage the project has progressed to.

IDENTIFYING CASE STUDIES

The PCS is not simply an extended PES. When selecting a case study you should:

- Think of a case where things did not go to plan – this can help **show your knowledge of the planning system and what you learned from the situation.**
- Determine how you will **divide the section word limit.** In some projects, you may have learned about how ethical considerations were dealt with while in others, the legal and political frameworks may have been considered. Alternatively, you may have been involved in one project which demonstrates all the competencies.

Think about confidentiality

You should ensure your submission only refers to information in the public domain and does not breach professional or commercial confidentiality. Your submission should not refer to individuals by name or make references which could make individuals easily identifiable.

4.4 Using case studies to demonstrate competencies

HOW TO STRUCTURE A CASE STUDY

One way to structure a case study is to include the following elements:

- problem definition – briefly describe the issue and provide enough background to provide the assessors with the context of the situation;
- the challenges and issues that arose and how they were considered and addressed; and
- a conclusion which summarises what you learned from the experience and how it relates to the competencies.

The RTPI also provides an indicative outline to help you structure your case study see: www.rtpi.org.uk/associate.

WRITING STYLE FOR CASE STUDIES

To demonstrate the competencies for Associate membership, it is important that you clearly set out your knowledge of the planning system and your role and contribution within it. You should not expect the assessors to presume anything from the tasks you describe in your PCS. Consider what happened, and reflect on the learning you gained from it.

You should therefore use language such as:

- “I became aware of this through...”
- “I was mindful that...”
- “this was not unexpected because...”
- “this project helped me to understand...”
- “the tensions resulted in...”

WRITING STYLE FOR CASE STUDIES – EXAMPLES

Poor examples	Improved examples
“I have become aware of the political nature of planning and now appreciate how it influences development.” 	“I became aware of the political nature of planning through attending X where I witnessed Y. I now appreciate how Z can influence development.”
“I completed the documents to comply with planning regulations.” 	“I completed the documents to comply with Act Z which states Y.”
“Throughout this project I demonstrated due care and diligence in accordance with the RTPI Code of Professional Conduct.” 	“On receipt of all documents, I examined X, Y and Z in accordance with Regulations C. I informed the client of B statutory timeframes, which was in accordance with clause X of the RTPI Code of Professional Conduct (due care and diligence); the client confirmed their agreement.”

5. Written submission: Professional Development Plan (PDP)

5.1 What is the PDP?

The PDP is the third section of the written submission; it is a **detailed plan** which sets out how you are going to meet your professional development needs in the two years after your submission. It answers the important question: **what next?** You are required to maintain a PDP as part of your membership and the assessors are looking to see that you understand this process.

5.2 Why is the PDP important?

All members entering the profession are required to begin a habit of lifelong learning and continuing professional development (CPD). Qualifying to enter a profession does not mean that you remain competent to practice for the rest of your life. All professions change, requiring all practitioners to continue to learn, debate, discuss and update skills or knowledge on an ongoing basis.

The PDP represents the planning stage of the CPD cycle¹⁸.

The RTPI Code of Professional Conduct states that members must:

- a) at least once a year prepare a PDP for the next two years identifying their personal professional development needs;
- b) in any two year period undertake a minimum of 50 hours' CPD activity related to the undertaking or managing of planning; and
- c) maintain a written record of their CPD activity.

It is a requirement to continue the reflective practice of preparing a PDP throughout your membership and the assessors are looking to see that you understand this process.

Please note that every year the RTPI carries out an audit of PDP and CPD records from a randomly selected sample of its membership. For more information on CPD monitoring please visit the RTPI website: www.rtpi.org.uk/cpd.

¹⁸ See [section 5.8](#) for a list of types of CPD.

5.3 Scope and structure

The PDP consists of:

- **SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis:** The SWOT analyses your current personal strengths and weaknesses as well as the opportunities and threats that could impact on your ability to meet your career goals. It should clearly link to the PES and / or PCS, and inform your approach to the goal, objectives and actions.
- **Goal(s):** A goal should be a high-level strategic statement of what you want to achieve. Each goal should be clearly set in the context of furthering your planning skills and knowledge. It should specify the end result i.e. what you will be able to do or be as a professional in two years' time, as a result of carrying out your plan. You must identify **one or two goals within your PDP**.
- **Objectives:** The objectives are sub-goals that narrow down and identify the developmental areas of knowledge and skills you will need to gain to achieve your goal. They are therefore a way of breaking down your longer term goals so that you can begin to work towards or prepare for it. You must identify **two to four objectives for each goal**.
- **Action plan:** The actions are the specific details of the CPD activities you will carry out to gain the skills and knowledge needed to meet your objectives. They need to include what you will do, where, when, why and how, what you will gain from it and how you will measure that development (meeting the SMART model¹⁹). You must draft **two to four SMART actions for each objective**.

The RTPI provides a **compulsory template** for the PDP that reflects this structure. When writing your PDP you should use the PDP checklist²⁰. Additional PDP resources are also available at: www.rtpi.org.uk/pdpresources.

Your PDP is not inflexible and should not prevent you from taking advantage of (and recording) valuable but unexpected CPD opportunities. However, it does allow you to plan your professional development in a structured way and evaluate all your CPD activities against carefully identified needs.

Personal or business development?

Your PDP must focus on your own personal professional development – what are **you** getting out of the plan? Your PDP is likely to be unsuccessful if it benefits an employer, business or organisation but does not clearly benefit or develop you. For example, whilst developing networking skills might be an appropriate objective, growing your professional network is not.

¹⁹ See [section 5.7](#).

²⁰ See [section 5.9](#).

5.4 SWOT analysis

Your SWOT analysis is presented in a grid so that you can easily assess your current circumstances.

EXAMPLE SWOT ANALYSIS

<p>Strengths For strengths, you might include:</p> <ul style="list-style-type: none"> • areas of strong planning knowledge and understanding • strong transferable skills and competencies, such as communication skills <p>Be confident about what you are good at – use your strengths to inform your goal.</p>	<p>Weaknesses For weaknesses, you might include:</p> <ul style="list-style-type: none"> • areas of weakness in planning knowledge and understanding • underdeveloped transferable skills and competencies, such as presentation skills • understanding that there is more to planning than your current experience <p>Your weaknesses should be used to inform the goals, objectives and actions for your plan. You are expected to address the majority of the weaknesses you have identified.</p>
<p>Opportunities For opportunities, you might include:</p> <ul style="list-style-type: none"> • opportunities within the industry • opportunities within your organisation • training and professional development opportunities • support of RTPI (Nations and Regions, Networks etc.) • opportunities to volunteer <p>Consider what opportunities can be integrated into your goal.</p>	<p>Threats For threats, you might include:</p> <ul style="list-style-type: none"> • industry downturns • negative changes within the organisation e.g. downsizing or restructuring • better qualified competitors • limited training opportunities <p>What threats could affect your ability to meet your goals?</p>

Watch out for weaknesses

There should be a clear link between your “weaknesses” and the goals, objectives and actions identified. The majority should be based around planning knowledge, skills or experience.

You do not need to list more than five weaknesses (at least three are required). Your PES and PCS should support and help to explain which weaknesses you are taking forward and why.

5.5 Writing goals

You must identify **one or two goals within your PDP**.

For a goal, you might like to think about:

- where you would like to be working (perhaps in terms of organisation, sector or even country);
- the nature of the work you would like to be doing (e.g. types of spatial planning role or specialism);
- what challenges will you face at work;
- the level you would like to be working at; and / or
- any gaps in your knowledge or skills or any emerging trends that you need to be aware of (bear in mind that this would need to be strategic enough so it can be broken down further in the latter parts of the plan).

Goals can be career aspirations, like developing a specialism, moving sector or gaining a promotion, as long as the planning context is clearly explained and the associated objectives are focused on furthering skills and knowledge.

Be aware that a goal such as 'to obtain a promotion' is, by itself, too broad. Instead, identify what type and level of work you will be doing.

EXAMPLE GOAL: I will be working as a senior planner within Organisation X dealing with large-scale residential planning applications with minimum support.

Keep your goal focused and strategic

Your goal does not need to include a lengthy explanation – one or two sentences will do. Consider the question: as a professional planner, where do you want to be in two years? You should take time to carefully consider your goals, as a reliance on vague or generalised statements will result in the PDP being deferred.

Goals that should generally be **avoided** include:

- 'To become a Chartered / Associate / Legal Associate Member'. This goal is not very meaningful. The whole process leads up to this, and once an application is submitted it is essentially out of your control. It also provides no indication as to how you would like to develop professionally in terms of knowledge and skills.
- 'To progress my career'. This goal is too vague to be meaningful. With this kind of goal you should consider what direction your progress will take, in what time frame, or indeed what you mean by 'progress'?
- 'To gain a promotion'. This goal is, in itself, too vague and would need to be broken down to explain the planning context. What type of promotion are you aiming for? What specific knowledge and skills will you need to gain, to be in such a role? This should lead to the setting of other, shorter-term objectives focussed on CPD activity."

5.6 Writing objectives (sub-goals)

You must identify **two to four objectives for each goal**.

Objectives can be:

- focused on a specific area of knowledge or skill, relating to the goal;
- shorter-term than your goal, and are likely to be addressed in the next 6-18 months.

They do not have to be SMART²¹ or measurable.

Improvements in professional skills such as negotiation, presentation or management are acceptable objectives as long as these are within the context of your planning career aspirations and the overarching goal(s).

EXAMPLE OBJECTIVE: Develop my presentation skills.

Need help identifying your development areas?

The RTPI provides a Core CPD Framework, developed with input from members, employers and the wider profession, which highlights the skills and knowledge areas members need to meet the planning challenges of today and the future, see: www.rtpi.org.uk/cpdframework.

5.7 Writing an action plan

You must draft **two to four SMART actions for each objective**.

Your Actions **must** meet the SMART model:

Specific: identify the specific CPD activity²² to be undertaken e.g. what reading, research, work-based learning or training course will you do?.

Measureable: identify your learning objectives and consider key performance indicators, or ways in which to consolidate your learning.

Achievable: show you have funding, approval, time off to undertake the activity. If you cannot show that the action is achievable, you need to have a back-up plan in place.

Relevant: to you in your work setting and objective.

Time-based: specify the dates the action will begin and end – all actions need to take place within the plan period.

Activities and tasks do not need to be sequential. You can carry out two or more activities concurrently. While your PDP is a two-year plan, the majority of actions can take place within the first year of the plan, if appropriate.

²¹ See [section 5.7](#) for a definition of the SMART model.

²² See [section 5.8](#) for acceptable forms of CPD.

A good action plan should be detailed enough for someone else to implement. It should answer questions such as:

- What will be done?
- How will it be done?
- Who will do it?
- When will it happen?
- Do you need senior colleague or line manager approval?
- Is there a budget for this training?
- Do you have permission to work shadow someone?
- Does it impact on your existing role?

The PDP template has columns to help you to ensure your action plan is SMART.

EXAMPLE ACTIONS

Action	How will you measure your learning?	Start date and end date
<p>(Specific, Achievable and Relevant to an objective on environmental regulations within planning)</p> <p>Agreed with my manager to give a presentation on changes to environmental regulations within planning at our staff CPD event.</p>	<p>(Measureable)</p> <p>Feedback forms will show that my colleagues understood and learnt from the session.</p>	<p>(Time-based)</p> <p>14 July 2020</p>
<p>I will review the following free resources on environmental regulations within planning:</p> <ul style="list-style-type: none"> • XXXX • XXXX • XXXX 	<p>I will note down my learning and incorporate them into future projects on X and Y.</p>	<p>April – August 2021</p>

Action	How will you measure your learning?	Start date and end date
<p>(Specific, Achievable and Relevant to an objective on leadership skills)</p> <p>Attend XXX Leadership Skills course. This will be self-funded and completed in my own time as I am a sole practitioner.</p>	<p>(Measureable)</p> <p>My increased confidence in speaking with be noted by clients and stakeholders at relevant meetings.</p>	<p>(Time-based)</p> <p>5 November 2020</p>
<p>I will mentor a junior planner to improve my coaching and leadership skills. If no junior planner is available to mentor, my back-up plan is to read X book on leadership.</p>	<p>I will seek feedback from the junior planner to determine how I have performed and how I could improve my mentoring.</p>	<p>December 2020 – April 2021, fortnightly meetings</p>

5.8 Sources of CPD

The RTPI accepts an extensive range of activities as appropriate CPD, which can be free or very low cost. This means you have a great opportunity to select activities that are appropriate to your needs. Some examples of valid development activities include:

- online learning modules;
- attending planning inquiries or hearings;
- formal events such as conferences, seminars or workshops;
- short courses;
- formal qualifications;
- structured targeted reading on a particular topic e.g. journals, online, policy papers;
- volunteering;
- work-shadowing or placement;
- mentoring or coaching;
- supervised academic research;
- preparation of materials for training courses, technical meetings or the technical press;
- involvement in a professional group;
- secondments;
- project work (beyond your day-to-day work);
- involvement in RTPI Nation or Region, chapter or network.

See also: www.rtpi.org.uk/cpdframework.

What actions are appropriate for a PDP?

Your Action Plan should **only** contain activities that are developmental for you e.g. reading or research, work shadowing, attending courses, work-based learning etc.

Actions that focus on doing your day job, applying for jobs or achieving professional membership are not usually developmental and should be avoided. Work based learning is acceptable, but you must highlight what you will learn from it (e.g. how taking on a new area of work will develop specific knowledge and skills).

Business development activity is also unlikely to form a SMART action, unless it is clearly linked to a personal development objective.

5.9 PDP checklist for success

Your PDP will be assessed against the following checklist:

- Your PDP must be on the template prescribed by the RTPI and available on the RTPI website: www.rtpi.org.uk/apc
- Your **SWOT links** to your PES and / or PCS (either partially or in its entirety).
- Your Action Plan addresses the **majority of weaknesses** identified in the SWOT.
- You have identified **one or two goals**.
- For **each goal** identified, you have **two to four objectives** which focus on skills and knowledge.
- For **each objective** identified, you have **two to four SMART actions**²³.
- Your PDP focuses on at least 50% planning related skills or knowledge. It is acceptable for other professional skills to make up the remainder of the plan.
- Your PDP covers the two-year period **after** the date of your submission. For example, if you submitted in January 2020 your PDP would run from January 2020 to January 2022.
- Your PDP is within the word limit for the written submission (guide of 1,500 words)²⁴.

These points must be met for the PDP to be successful.

Does the PDP need to be corroborated?

You are not required to have your PDP corroborated although you should indicate that you have the relevant support for any actions which require it (e.g. budget in place for attendance on a training course).

²³ See [section 5.7](#) for an explanation of the SMART model.

²⁴ The word count for the PDP **only** includes the text you enter into the template.

6. Educational background b: Planning Degree Statement (PDS) and Matrix

6.1 What is the PDS and Matrix?

If you are applying for membership with a non-RTPI accredited planning degree (educational background b), you benefit from being required to demonstrate the same number of years as candidates with an RTPI accredited degree (educational background a). Educational background b candidates therefore need to prepare an additional statement and matrix to demonstrate that their degree contained sufficient planning content.

See [section 2](#) for an explanation of educational backgrounds.

Should you apply under educational background b or c?

If you studied a non-RTPI accredited planning degree but are unable to demonstrate the PDS and Matrix requirements, you should apply under educational background c (with an additional year's experience).

If you meet the experience requirements for **both** educational backgrounds b and c you can apply under either educational background.

6.2 Scope and structure

If you wish to apply based on educational background b you must provide the following:

- a full degree transcript;
- a Planning Degree Statement (PDS) explaining how your degree covered six broad principles that govern planning operations²⁵:
 - Social science as an analytical framework
 - The interplay between land use and transportation
 - Design and the realisation of place
 - Economic issues relating to development
 - Environmental challenges
 - Legal and institutional frameworks
- a Matrix mapping the six principles above against each module title within the degree.

The RTPI provides a **compulsory** template for the PDS and Matrix. The PDS and Matrix **together** must not exceed 1,000 words (excluding any words which already form part of the template).

If your degree covered a specific aspect or area of planning (such as urban design, regeneration) you will need to show how it relates to the topics listed above.

²⁵ Taken from the RTPI's Policy Statement on Initial Planning Education.

6.3 Criteria for assessment

The PDS and Matrix **must** evidence that a minimum of 75% of the modules studied in your degree was spent on the six broad principles outlined in the section above. Not all principles need to be addressed in equal weight.

You only need to discuss the degree that is relevant to your application. Alternatively, you can use two degrees if you can demonstrate that 75% of the total modules studied **across both degrees** was spent on the six broad principles. A module is defined as a class, unit or subject which is undertaken as part of a degree or course.

You need to briefly explain the value and relevance of course content studied, including any major projects, assignments or exams. You do not need to reflect on learning outcomes from your degree.

7. Presenting your submission

7.1 General presentation

The submission is a demonstration of your professionalism and a reflection of the standard of your work. Your application will therefore also be assessed on its presentation and may be deferred if it:

- contains spelling mistakes;
- uses incorrect grammar and punctuation;
- is poorly laid out and / or not professionally presented.

In addition to the above, for your application to pass the RTPI's validation checks, the submission **must**; be in English, be within the word limit, the PES and PCS must have page and paragraph numbers and the PDP template must be used.

This is a professional qualification and submissions that include inappropriate information, or breach confidentiality, are likely to be unsuccessful.

7.2 Recommended format

The following format for the submission is recommended:

- word processed in Arial 11pt font;
- double spaced for easier reading and assessment;
- your membership or contact reference number is on each page;
- referencing, where required, should be to the Harvard style (i.e. author, date).

Details on how to submit your application can be found online at: www.rtpi.org.uk/membership-submit.

Do not forget to proof read

Build time into your application preparation to ask someone to read your submission. It may help to ask a non-planner to read your submission to see if they can understand what you do.

7.3 Diagrams, illustrations and additional materials

You are permitted to include illustrations in your written submission, though this is not a requirement. It is unlikely that more than two illustrations would be needed in the main body of the submission.

Appendices, including any additional materials including reports, cuttings or diagrams, are not permitted to accompany the written submission. Assessors will base their decision on the work described and reflected upon within your written submission and will not take into account opinions of a third party (appraisals, references, performance reports etc.).

7.4 Confidentiality, plagiarism and ethical considerations

Your submission should be written in the spirit of the RTPI Code of Professional Conduct. This means that you need to:

- maintain professional confidentiality (for example, when referring to material that may be considered professionally sensitive you may wish to anonymise names and locations);
- avoid specifically naming colleagues or other professionals, regardless of whether this is in a positive or negative light;
- ensure the submission is entirely your own work and appropriately reference other sources of material (if applicable).

If that proves to be difficult, please contact the RTPI Membership Team to seek advice.

The RTPI will investigate all suspected instances of plagiarism by candidates and take disciplinary action if necessary; and you may be asked to adhere to administration procedures which seek to address plagiarism.

Your submission is confidential

All submissions are treated as confidential and our assessors are bound by a confidentiality agreement.

7.5 Word limit

The word limit for submissions²⁶ is 4,000 words +/-10% (i.e. 3,600 – 4,400 words). The submission itself is indicative of your research, analysis and report writing skills. The submission should be divided, approximately, in the following proportions:

PES – 1,000 words
PCS – 1,500 words
PDP²⁷ – 1,500 words

You must include a word count at the end of each section of the submission.

Exceeding the word limit will result in delay and possible rejection of your submission.

²⁶ See [section 6](#) for the word limit for the PDS and Matrix (educational background b candidates only).

²⁷ The RTPI provides a template for the PDP which is compulsory to use. When calculating your word count, you should only count words which **you** add to the template.

7.6 Footnotes

Footnotes must only be used for cross referencing (e.g. within your submission or to other documents) or explaining abbreviations. Footnotes are not included in the word limit.

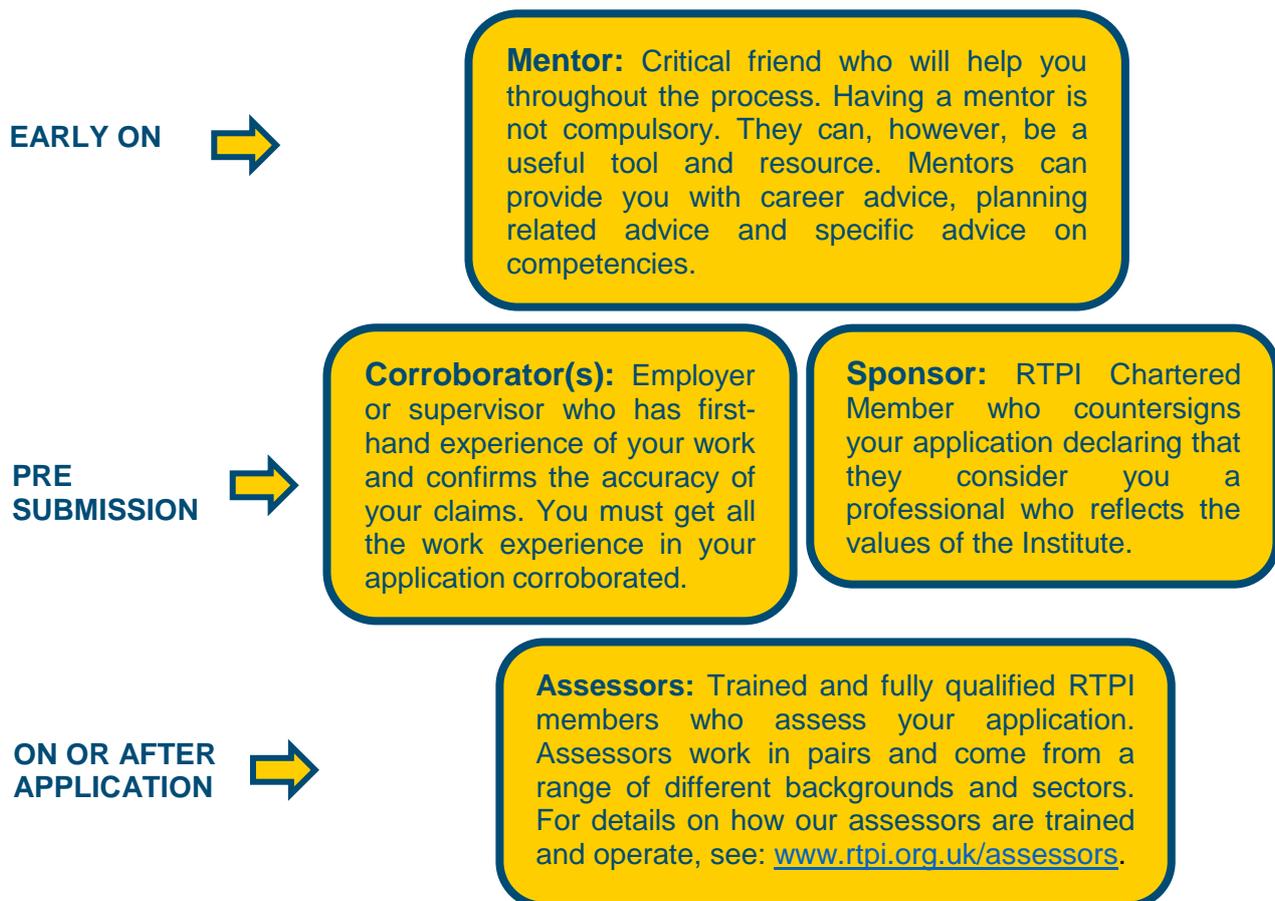
Excessive use of footnotes, or using footnotes to include additional information, and therefore increasing your word count, will result in you being asked to review your submission. Competencies or experience demonstrated only or predominantly in footnotes will not be deemed successful.

8. Corroboration, sponsorship and supporters

8.1 The people involved

Many people will assist you in the membership application process. The roles these people will play are explained below.

THESE PEOPLE GET INVOLVED...



The RTPI Membership Team are also available to support you from beginning to end. They can advise on queries about the process and regularly publish resources to assist you; they also deliver RTPI membership events. After you have submitted your application, the Membership Team will complete relevant validation checks and can help if you are required to resubmit your application or are considering an appeal.

Can one person be my corroborator, sponsor and mentor?

Your corroborator, sponsor and mentor could all be the same person if they can fulfil each of the roles defined above. They must complete the relevant form for each role.

8.2 Mentors

Mentors are not compulsory, and may fulfil a different role for those practitioners who have extensive experience. A mentor can help you get the most from the application process, provide you with additional support and help you with reflection. The RTPI therefore encourages all candidates to consider working with a mentor.

THE MENTOR'S ROLE

Mentors can fulfil a variety of different roles: a coach, a counsellor, a facilitator of networking opportunities, or simply a sounding board. However, mentors will generally:

- make themselves available to provide advice and support you either face-to-face, by email or over the phone;
- attend meetings with you at mutually agreed times;
- offer advice in setting specific and measurable objectives;
- offer guidance on the production of a PDP;
- offer advice, where appropriate, on the final written submission;
- guide you towards becoming more critically reflective of your own practice and progress; and
- give you support and advice on professional matters.

Confidentiality is central to the mentoring process and open discussions will strengthen the relationship and lead to better outcomes. It is not the role of the mentor to lead the application process, which will always be your responsibility.

FINDING A MENTOR

If you feel that you would benefit from having a mentor, it is your responsibility to find one as this is part of your professional development. Your mentor does not have to be a Chartered Town Planner, however, they do need to understand the RTPI membership application process (i.e. read this guidance). Your mentor could be someone you know already from your own professional networks; other avenues for finding a mentor include networking through RTPI networks or at RTPI regional or national events.

Current assessors are not able to act as mentors, nor comment on specific applications, though they can give general advice on the application process and principles.

The RTPI provides a Mentoring Advice Note to assist mentors.

8.3 Corroborator Declaration Form

Your application **must** be accompanied by completed Corroborator Declaration Form(s), which are available on the RTPI website. Corroboration is a vital part of the application as it ensures the integrity of all submissions.

WHO CAN CORROBORATE?

The Corroborator Declaration Form must be completed by your supervisor(s) or employer(s). You cannot have your application corroborated by subordinates. Corroborators need to read your application (excluding the PDP) and confirm the accuracy of your claims. They therefore must have first-hand experience of your work. Your corroborators do not have to be members of the RTPI.

You should maintain relations with previous employers when you change jobs. This will make it easier to obtain corroboration at a later stage, when you have finalised your application.

CORROBORATOR DECLARATION FORM REQUIREMENTS

Your corroborator **must** provide the following information in the Corroborator Declaration Form:

- your name;
- your role within the organisation;
- your relationship to the corroborator;
- start and end dates of the corroborated time period²⁸;
- details on the work you have undertaken during the corroboration period; and
- confirm that the corroborator has read the relevant parts of your application and that they agree with your claims.

How many Corroborator Declaration Forms do I need?

The number of Corroborator Declaration Forms you submit will be dependent on your work history. **All experience in your application must be supported by a Corroborator Declaration Form.** If you are unable to obtain corroboration for a certain time period, please see our Corroborating Your Submission Advice Note.

Self-employed applicants must have the Corroborator Declaration Form completed by clients or other professionals who have direct knowledge of their work.

For further details on corroboration, see the Corroborating Your Submission Advice Note.

8.4 Sponsor Declaration Form

Your application **must** also be accompanied by a completed Sponsor Declaration Form, signed by a current Chartered Member of the RTPI. The Form is available on the RTPI website. Your sponsor must declare that they have read and support your application and that they consider you a professional who reflects the values of the RTPI.

You must have known your sponsor in a professional capacity for a minimum of six months.

²⁸ If the corroborator is unable to verify the entire period of employment in a role, additional corroboration will be required.



RTPI

Royal Town Planning Institute

ASSOCIATE MAIN
GUIDANCE
RESOURCES



**Access all resources including advice notes, templates, forms, online learning modules and events at:
www.rtpi.org.uk/associate**

**Contact the Membership Team:
membership@rtpi.org.uk
+44(0)20 7929 9462**

Thank you for reading this guidance.

Good luck with your application.

**FIND OUT MORE:
[www.rtpi.org.uk/
associate](http://www.rtpi.org.uk/associate)**