



RTPI

mediation of space · making of place

ASSOCIATE MEMBERSHIP GUIDANCE

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This document replaces the previous Associate membership candidate guidance document.

This document must be used for any first time applications submitted from January 2017.

Failure to comply with this document from January 2017 onwards will result in your application not being accepted by the RTPI.

1. Overview

The RTPI's 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 spatial planning agenda, both in the UK and overseas, and Associate membership is designed to engage with and offer recognition for these individuals.

1.1 What does it mean to be an Associate?

Associate membership is a partial professional qualification, awarded in recognition of the applicant's achievement and demonstrable involvement in, or engagement with, particular areas of spatial planning. Associate membership therefore indicates that the holder has achieved a certain level of knowledge and experience in their chosen spatial planning field.

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. They are denoted by the post-nominals AssocRTPI¹.

Associates must abide by the RTPI Code of Professional Conduct (available at www.rtpi.org.uk). This sends a clear signal that the member upholds high professional standards within their field of spatial planning.

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

1.2 Eligibility

You will need to demonstrate a balance of educational background and experience to show how you meet the requirements for the Associate class. You must have:

- Between **2-7 years'** experience engaged with spatial planning. The exact amount varies according to your educational background, as shown in Table 1.
- Up to 12 months' experience (full-time equivalent) may have been gained before completing your qualification (background a-d in Table 1), providing that experience is at the appropriate level. (See Sections 1.3-1.5 for more details on experience requirements).

Table 1

Educational background	Experience required
a. Spatial planning degree (specialist or spatial RTPI accredited ²)	2 years
b. Spatial 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

¹ Introduced from 2017.

² If you have both of these, or a combined RTPI accredited qualification, you are eligible for and must follow the Licentiate APC route to Chartered membership (and would not be able to apply for Associate membership).

Queries about eligibility should be directed to the RTPI Membership Team on 020 7929 9462 or at membership@rtpi.org.uk.

1.3 Type of experience required

The table below outlines the different types of experience that can and can't count towards becoming an Associate.

Experience type	Can it count?
Full- or part-time experience or a combination of both (pro rata). To calculate part-time experience you need to pro rata your part-time hours against the 35 hour week. ³	Yes
Paid or voluntary experience.	Yes
Experience gained in the UK or overseas.	Yes
Experience spread over a longer period of time. The years of experience required do not need to be consecutive, breaks in employment for parental leave, caring, redundancy or travelling are fine and can just be factored into your spatial planning experience.	Yes
Experience gained whilst on a sandwich year or vacation placement. Please note that, in some cases, the work undertaken on a sandwich year may not be at the relevant level and therefore may be discounted by the assessors.	Yes
Experience gained whilst self-employed. As long as you can demonstrate a consistent period of planning experience at the appropriate level.	Yes
Experience gained prior to completing your educational qualification. Up to 12 months of your experience may be gained prior to completing your educational qualification (as set out in a-d in Table 1) as long as it is at the appropriate level.	Yes
Experience gained whilst undertaking a full- or part-time degree or further studies.	Yes
Experience less than three months in duration (full-time equivalent).	No
Experience that is purely administrative or at a technical support level.	No

NOTE

If you do not have full-time experience you must demonstrate how you calculated your eligibility. For example, if you have 36 months of 4 days 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 work 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: 18 months**

³ Please note you can only pro rata part-time experience. You cannot pro rata full-time experience if working more than 35 hours a week.

1.4 Who might become an Associate?

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.

Candidates could be employed in the public or private sectors, be employed by charities or NGOs. The RTPI welcomes candidates who are engaged in teaching and/or academic research in an area of spatial 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 *Advice Note – Academic Experience* is available on the [RTPI website](#).

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

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

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

- Architecture
- Construction
- Surveying
- Engineering
- Housing and housing management
- Land reclamation
- 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' spatial 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

These lists are not exhaustive: candidates from other backgrounds are welcome. Candidates who are in any doubt as to the eligibility of their experience should contact the RTPI Membership Team on 020 7929 9462 or at membership@rtpi.org.uk.

1.5 Nature of eligible experience

Whatever the candidate's background, assessors will be looking at how their experience engages with spatial planning. Each candidate should be able to show a working understanding of the elements of the spatial planning system with which they are engaged and demonstrate how their area of work engages with spatial planning.

Candidates who are not directly involved in 'core' spatial planning functions must demonstrate that their work engages with spatial planning. They should not be working in isolation, but engaging with planners. For example, a candidate with a background in regeneration might demonstrate how they have worked with planners to see how some parts of a regeneration strategy became part of planning policy.

Candidates' experience might include being engaged with some of the following aspects of spatial planning:

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;
- the 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:

- academic research for a PhD or further study;
- 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;
- the monitoring of plans and policies leading to reports and plan revision;
- planning submissions, or research appraisal.

1.6 The people involved

Many people will assist you in attaining Associate membership. The roles these people will play are explained below.

- **You:** The application process, from start to finish, is about you. You are responsible for demonstrating how you meet the requirements based on your experience, skills and knowledge.
- **Your mentor:** Acts as a critical friend who can help you throughout the application process. More information about mentors can be found at Section 1.7.
- **Your sponsor:** A current Chartered Town Planner who will sponsor your application for membership. Your sponsor must sign the Sponsor Declaration Form. More details on the sponsor declaration can be found in [Section 2.4](#).
- **Your corroborators:** This is someone who has first hand knowledge of the work you have done and will confirm, in writing, the accuracy of your claims (for example, this may be your line manager or employer). All the work experience used to support your application for membership must be corroborated. The number of corroborators you have will vary depending on your employment history. More details on what a corroborator needs to provide can be found in [Section 2.5](#).
- **The assessors:** Chartered Town Planners who review your final submission. Our assessors come from a range of different backgrounds and sectors, and are based in the UK and internationally. Our assessors work in pairs and receive training on an annual basis.
- **The RTPI Membership Team:** Any specific queries about the application process can be directed here. The team can also provide additional support to candidates who are resubmitting. You can contact the Membership Team on 020 7929 9462 or at membership@rtpi.org.uk.

Some of these roles may overlap (e.g. your mentor may also be your sponsor if they are a Chartered Town Planner).

1.7 Mentors

Though not compulsory, a mentor can help you get the most out of your submission for Associate membership and will provide you with additional support. Mentors can fulfil a variety of different roles: a coach, a counsellor, a facilitator of networking opportunities, or simply a friend. 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 Professional Development Plan (PDP);
- offer advice, where appropriate, on the final written assessment;
- guide you towards becoming more critically reflective of your own practice and progress;
- give you support and advice on professional and professionally-related matters.

Confidentiality is central to the mentoring process.

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, although if your experience has been initially in another profession you may find it helpful for them to be one.

Many people have a stereotypical view of a mentor, assuming they need to approach a very senior person in their organisation, or their supervisor or manager. This is not necessarily so. Ask around your organisation and professional networks. Other avenues for finding a mentor include:

- networking through RTPI networks or forums;
- networking at RTPI regional or national events; or
- contacting large planning organisations.

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

1.8 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 on the [RTPI website](#).

2. The application process

2.1 What do I submit?

Your submission must consist of the following:

- a completed application form;
- a personal details and payment form;
- a written submission of 4,000 words (+/- 10%) comprising:
 - i. [Practical Experience Statement \(PES\)](#) – approximately 1,000 words;
 - ii. [Professional Competence Statement \(PCS\)](#) – approximately 1,500 words;
 - iii. [Professional Development Plan \(PDP\)](#) – approximately 1,500 words;
- scanned copies of any relevant degree certificates or apprenticeship completion certificate (for educational backgrounds a, c or d as set out in [Table 1](#)) or academic transcripts (for educational background b only)⁴;
- statement of planning content of your degree (educational background b only) – 500 words (+/- 10%);
- a [sponsor](#) declaration;
- declarations from [corroborators](#) which cover the whole period of your employment history;
- a proof of payment of the administration fee either online or by cheque.

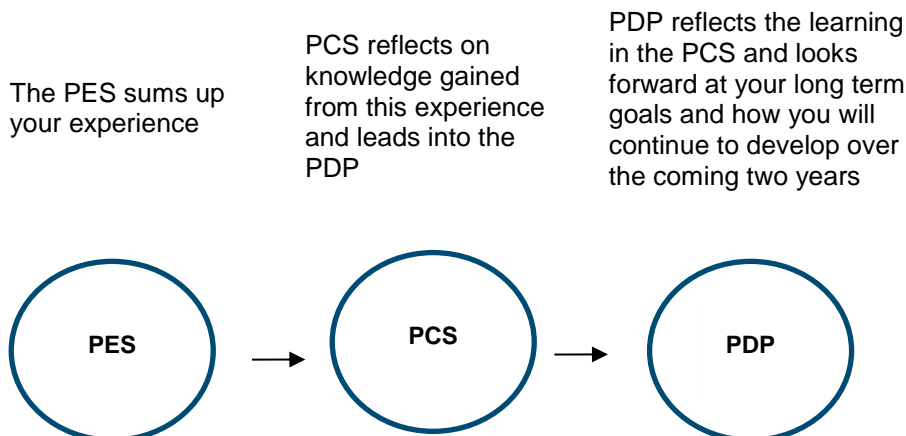
Each of these components should be submitted as a separate Word or PDF file and labelled as indicated in [Section 2.6](#). If you are using a Mac computer please save your document in a Word compatible format.

Top tips on how to prepare your submission can be found in [Section 7](#) of this document.

2.2 The written submission

The written elements of your submission are all interrelated. You should cross reference between them and ensure that each section is consistent with the others. Sections 4, 5 and 6 of this document provide information on each of the elements of the submission (PES, PCS and PDP) and on how to best prepare your submission. **Please ensure you proof read your submission.**

Relationship between the PES, PCS and PDP



⁴ If your degree certificate or transcript is in a language other than English, you will need to provide a certified translation.

2.3 Statement of planning content of degree

Candidates wishing to apply on the basis of educational background must provide the following:

- a full degree transcript; and
- a written statement (500 words, +/- 10%) explaining how their degree covered the following broad principles that govern planning operations⁵:
 - 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

Candidates whose degree covered a specific aspect or area of planning (such as urban design, regeneration) will need to show how it relates to the topics listed above. Candidates must demonstrate that 100% of their degree was spent on these topics.

If you have more than one degree, you only need to describe the one that is relevant to your application.

2.4 The sponsor declaration

Your application for Associate membership must be sponsored by a current Chartered Town Planner. You must have known your sponsor in a professional capacity for a minimum of six months. The Sponsor Declaration Form is available on the [RTPI website](#). Evidence of sponsorship must be included with your application.

Your sponsor must confirm that they have read your submission, and declare that they support your application and that they consider you to be a professional who reflects the values of the RTPI.

Your corroborator or your mentor can also be your sponsor; however, they must complete the sponsor declaration as well as providing corroboration.

2.5 Corroborating your submission

It is important that you have your PES and PCS corroborated by the relevant supervisor or employer. This is, in part, to ensure the integrity of all submissions. It is also for your benefit. Having someone review your submission will assist you in your reflection. This process will also ensure that your employer is aware of the claims you are making and the work that you have put into your submission. Please note that the RTPI does not require you to have your PDP corroborated.

You should maintain relations with previous employers when you change jobs. This will make it easier to obtain corroboration at a later stage.⁶

Self-employed applicants should include statements from clients or other professionals who have direct knowledge of your work.

⁵ These are taken from the RTPI's Policy Statement on Initial Planning Education.

⁶ If your previous employer has changed jobs or retired, or the organisation you worked for no longer exists, you should ensure that they declare this within their corroborating statement.

NOTE

Any experience that you rely on in your submission must be corroborated.

Corroboration must come in the form of a letter or email from each employer or manager referenced in your submission. Within the letter or email, the corroborator must state:

- your name;
- your role within the organisation;
- their relationship to you;
- dates that you were employed;
- comment specifically on the work you have undertaken; and
- that they have read the relevant parts of your submission and agree with your claims.

The corroboration must be on letterhead or sent from a work email. (For corroborators' convenience, a form has been produced to help them gather the required information and is available on the [RTPI website](#)). It is not adequate to provide a generic letter.

Your corroborators do not have to be members of the RTPI. Your corroborator can also be your sponsor if they are a Chartered Member. Your mentor can corroborate your statement if they are also your employer.

2.6 How to submit your application

You must submit your application electronically as either a Word document or a PDF file. Submitting as a PDF file will ensure that your formatting, such as page layout, will not change so you may prefer to convert your files to PDF. Any letters or emails of corroboration are also best submitted as a PDF file. If you are using a Mac computer, please save your document in a Word compatible format.

Your application form, personal details and payment form, PES, PCS, PDP, sponsorship and corroboration must be submitted as separate files. Please label each file using the following convention:

Contact reference number⁷ – last name – Associate – description of file (e.g. 00000 Smith Associate PDP)

Email your submission to membership.applications@rtpi.org.uk. The RTPI accepts files up to 10 MB. If your application is larger than this, you will need to divide the application over several emails. Please ensure each email is properly labelled so that RTPI staff can identify all elements of your application. **Please also include your contact reference number and 'Associate membership application' in the header of your email.** (If you are not sure what the number was please contact membership@rtpi.org.uk.)

You can pay your administration fee online, by accessing the 'Membership' pages of the [RTPI website](#). Please include a copy of the receipt with your application. If you are paying by cheque or your employer is paying, please submit a copy of the application form with your cheque. Cheques should be payable to 'Royal Town Planning Institute'. Submissions will only be accepted electronically in the required format detailed above.

⁷ If you have ever been an RTPI member (e.g. Student, Affiliate), this will be your current or previous membership number. If you have never been a member please use "00000".

2.7 Submission deadlines and results dates

Submission deadlines and results dates are scheduled in advance and published on the [RTPI website](#). You will be advised of the outcome of your application by email and your full results will be posted to your primary address to arrive by the published date. The RTPI will not provide results before the published date.

2.8 How the submission is assessed

Once you have submitted your application:

1. The Membership Team will complete administrative checks to ensure you have submitted all relevant documentation. Your application may be delayed or rejected if there are any issues, so please ensure you undertake the checks yourself.
2. The submission will be sent to two RTPI trained assessors, who are current Chartered Town Planners. 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 the RTPI as an Associate.
3. Initially, the assessors will consider the submission independently of each other and then arrange to confer and agree on a recommendation as to whether you have met the requirements.
4. The assessors complete a feedback report detailing the outcome of the assessment and make a recommendation as to whether you have demonstrated the requirements to become an Associate. You are formally assessed on the PES, PCS, PDP and general presentation (and, for background b only, the planning content of your degree).
5. The Membership Team review the assessors' report to ensure that due process has taken place.
6. You will be sent your results and the feedback report.
7. If you have been successful, you will be elected as an Associate of the RTPI. If the assessors feel that some improvements are required for your PDP, you will be elected subject to the criteria set out in [Section 2.10](#).
8. If you have been deferred, you will receive information in your feedback report detailing what you have to resubmit.
9. If your submission has been rejected, you will receive detailed feedback, advice and guidance (including the availability of other membership options).

2.9 Assessment outcomes

There are three possible assessment outcomes – successful, deferral and rejection:

- A successful outcome means you have demonstrated that you have the required experience and meet all the competencies. If you are successful, you will be elected an Associate.

- A deferral means that you have not yet met some or all of the requirements. This is not a failure. You are being asked to provide additional information to demonstrate the relevant competencies.
- A submission can be rejected, but only subject to the following criteria:
 - A submission can only be rejected if the candidate’s experience, demonstrated in the PES, is short of the experience requirements by two years or more⁸.
 - A submission cannot be rejected the first time it is made. If the assessors think that the candidate’s experience does not meet the requirements, the candidate will be given the opportunity to clarify their experience in a resubmission.
 - A submission cannot be rejected because the PCS and/or PDP do not meet the requirements. 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 and addresses each of the three parts of the submission separately.

- If you have been deferred the feedback report will explain the reasons for the outcome. Most importantly the report will give you direction on what you need to do to address the assessors’ concerns with your submission. Depending on what you have been deferred on, the assessors will request either a full resubmission of the relevant section or a supplementary statement. Where possible, resubmissions are sent to the same assessors who determined the outcome of the original application.
- If your submission has been rejected, you will receive detailed feedback, advice and guidance (including the availability of other membership options).

NOTE

If you are required to resubmit, you will not be reassessed on any part of the submission or competencies that have already been considered successful, except general presentation.

2.10 PDP advice

The PDP is an important part of being a reflective practitioner. The assessors may feel that your submission is successful, and that you have demonstrated your competence, but there are elements of your PDP that could be improved. In this event, **you will be elected as an Associate** and you will be required to submit another PDP to the RTPi for further comment. You will be informed of this process in your results letter and feedback report. You will also enter Continuing Professional Development (CPD) monitoring. This means that after two years you will be written to and required to submit:

- i. Your current PDP
- ii. PDPs for the two year period
- iii. A CPD record showing 50 hours of CPD in the previous two year period.

⁸ See Section 2.11 – candidates have up to 2 years from the date of their original submission to gain more experience.

CPD is a requirement under the Code of Professional Conduct. If you fail to submit a PDP or fail to comply with the RTPI's CPD monitoring request, this will constitute a breach of the Code of Conduct and disciplinary action would be taken against you.

2.11 Resubmissions

If you have not met any or some of the competencies you will be asked to resubmit either the full section or provide a supplementary statement. If you have not met the experience requirements you can wait for the appropriate future submission date. You may wait with your resubmission up to two years from the date of your original submission, after this period you will have to submit a new application with at least one recent case study.

Further details about resubmission are on the [RTPI website](#).

2.12 Appeals procedure

Candidates who have resubmitted their application at least once, and are still unsuccessful, can submit an appeal, if they feel that they have a reason to presume that the assessment of their submission was not carried out in a thorough and professional manner. For any queries about appeals and the process, please contact the Membership Team on 020 7929 9462.

3. Format of the written submission

3.1 Structure

The submission should be broken down into the three sections:

- [Practical Experience Statement \(PES\)](#)
- [Professional Competence Statement \(PCS\)](#)
- [Professional Development Plan \(PDP\)](#)

There is a PDP template on the [RTPI website](#) and it is compulsory to use this.

3.2 Professional standard

Candidates must ensure their submission is of a high professional standard. You are formally assessed on general presentation. You must check your submission to ensure:

- it does not contain spelling mistakes (spell check does not always give the right outcome so do not rely on it);
- the grammar is correct;
- it is laid out clearly;
- it meets the guidelines on formatting as set out below; and
- it is professionally presented.

Build time into your application process to ask someone to read your submission. Badly presented submissions are likely to be unsuccessful. This is well within your control and a hastily put together submission is not going to get you the outcome you want. Ask a non-planner to read your submission to see if they can understand what you do.

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

3.3 Presentation

Consider how your submission is presented. The submission must be Word processed in Arial 11pt font and double spaced for easier reading. The submission must be in English and composed to a high professional standard.

Referencing, where required, must be to the Harvard style (e.g. author, date). **Paragraphs and pages of your submission must be numbered** – this enables the assessors to provide specific feedback on your submission. Include your full name and contact reference number on each page.

3.4 Additional materials

Candidates are permitted to include illustrations in their written submission, though this is not a requirement. It is unlikely that more than two illustrations would be needed.

Appendices, including any additional materials, such as reports or cuttings, are not permitted to accompany the written submission. Assessors will not base their decision on examples of the candidate's professional work other than that described and reflected upon within the written submission and will not take into account opinions of a third party (manager appraisals, references, performance reports etc.).

3.5 Confidentiality, plagiarism and ethical consideration

You are required to demonstrate an appreciation of the RTPI Code of Professional Conduct, and your submission should be written in the spirit of this Code. Therefore, you should be aware of professional confidentiality and ensure you have your employer's consent before disclosing any material that may be considered to be professionally sensitive. In the event that this consent cannot be obtained, you must either omit or disguise this information by anonymising names and locations.

You should avoid specifically naming colleagues or other professionals, regardless of whether this is in a positive or negative light. If that proves to be difficult please contact the Membership Team to seek advice. All submissions are treated as confidential and our assessors are bound by a confidentiality agreement.

Your submission must be all your own work. In the event that a candidate is found to have plagiarised, appropriate action will be taken by the Membership Team.

3.6 Word count

The word limit for submissions is 4,000 words +/-10% (i.e. 3,600 – 4,400 words). The submission itself is indicative of the candidate's research, analysis and report writing skills. You should include the word count at the end of each section of the submission.

The submission should be divided, approximately, in the following proportions:

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

Write the word count for each section after the final paragraph. Introductions, headings and sub-headings must all be included in the word count.

The PDP template (instructions, column headings etc.) is not included in the word count. Exceeding the word limit will result in delay and possible rejection of your submission so please double check the word count before sending the submission.

3.7 Footnotes

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

Footnotes should not normally take up more than the equivalent of four lines of text. 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.

4. Practical Experience Statement (PES)

This is the first of the three sections of your written submission. The recommended word count for this section is 1,000 words.

4.1 The purpose of the PES

The PES is used to assess whether you have undertaken sufficient practical experience at the relevant level to justify your election to Associate membership. In the PES, you are providing the assessors with an overview of your eligible experience. This experience must be current up to a month prior to your submission.⁹

If you only just meet the experience requirements (as set out in [Table 1](#)) you may wish to wait longer before submitting. It is best to make a professional judgement yourself about your experience.

4.2 How to structure the PES

In the PES, you need to describe the experience of engaging with spatial planning that you have gained over the period of practical experience. You should provide coverage in chronological order. For each position you have held, the statement must include:

- the name and type of employer;
- the nature of the business (mainstream planning, local planning authority, multi-disciplinary practice etc.);
- the size of the organisation and where you sit within the organisation;
- your own job description: a summary of the main role and responsibilities;
- the nature of the work you undertook in the role; and
- dates and time periods covered.

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

You need to describe how your work has been engaged with spatial planning. If your job has changed or evolved within a single organisation over the period of practical experience, you should clearly indicate this. If some of your experience was gained in areas that were not engaged in spatial planning, you need to estimate the proportion of your time that was.

NOTE

If you do not clearly articulate what **you** did in your roles, you may be asked for a supplementary statement or to resubmit a section of your submission which will delay your election. Spending the time defining your contribution in the PES will make preparing your PCS easier. Your PES must show that you have gained the relevant amount of experience.

⁹ If you are not currently in employment, please indicate in your PES how you are keeping your planning skills and knowledge up to date.

4.3 What do the assessors look for in the PES?

The assessors will use this part of the submission to determine whether you have the right amount and the right 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;
- they have difficulty identifying what part of the work outlined was done by you;
- you have described roles that are predominantly administrative, or generic management, and not engaged with spatial planning; or
- they are not convinced you have gained the required amount of experience, given your educational background (see [Table 1](#)).

5. Professional Competence Statement (PCS)

This is the second section of your written submission. The recommended word count for this section is 1,500 words.

5.1 The purpose of the PCS

Professionals engaged with spatial planning rarely encounter standard problems needing standard solutions and it is thus the ability to learn in a reflective manner, through taking action, that is the hallmark of the true professional.

You need to show an understanding of the context in which you operate, that you are aware of the factors that impact on your work and that you can analyse and criticise work to understand how to develop and improve performance.

There are 8 competencies in total that you will need to demonstrate in the PCS. Information on how to demonstrate each competency can be found in [Section 5.3](#).

NOTE

It is important that the PCS is not too descriptive. It is not only about what you did, but also why you did it in a particular way and how you went about it.

5.2 Using case studies

The PCS is not simply an extended PES. You are expected to demonstrate your experience and competence through the use of case studies and you should:

- **Use one to two case studies to demonstrate you have met all the competencies.** The most effective way to demonstrate your professional competence is by discussing one to two case studies or projects drawn from your experience. Identify which aspects of your experience demonstrate each of the competencies outlined in [Section 5.3](#). Carefully select your case study or studies and determine how you will divide the word limit.
- **Use language that shows your own personal awareness.** Use language such as: “I contributed to this by...”; “I was responsible for...”; “I learned...”; “this project helped me to understand...”; “the tensions resulted in...”; “this was a challenge for me because...” or “as a result of changing circumstances, I...”.

Keep in mind that:

- **You must not structure your submission around the competencies.** You will not be able to present an effective submission if you adopt a tick-box approach using a short example of how you met each competency or if you 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 do not need to only use case studies where the outcome was successful or where your decisions and actions were successful.** It can sometimes be easier to show reflective thinking when something when something was unsuccessful or

where the anticipated outcomes were not achieved. The assessors are not judging you on the outcome of the case study project but on your contribution and learning.

- **You are not being judged on the size of your case study.** It is better to choose a smaller case study where you have had considerable involvement and input, over a larger case study where your contribution may have been limited.

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 addressed; and
- a conclusion which summarises what you learned from the experience and how it relates to the competencies.

NOTE

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

5.3 The competencies required to become an Associate

Your PCS will be assessed against 8 competencies which are all equally important and integral to becoming an Associate. The competencies are interrelated and linked to one another.

The Institute has set out the minimum type of evidence you are required to demonstrate for each competency. Some candidates will have achieved more in their career and are encouraged to demonstrate this.

The types of evidence required range from ‘awareness’ to ‘core’ and are defined below. ‘Application’ type is not required to become an Associate but is included to aid understanding of the range of types, and because it is required for some of the competencies to be demonstrated by Associates who go on to become Chartered Members through the Associate APC.

1. **Awareness** – Demonstration that you have knowledge of the competency and its implications for your work.
2. **Understanding** – Demonstration of how the competency applies to your case study from a theoretical or observational viewpoint. Whilst your personal experience of the competency is not essential, your understanding of how and why the competency applies to your case study should be apparent.
3. **Application** – Demonstration of how the competency applies to your case study from a personal practical viewpoint. Your personal experience and evidence of depth of knowledge of the competency are essential.
4. **Core** – Demonstration of how the competency is integral to your actions as a professional. This is more than just the application of your knowledge, it should be core to how you operate and be imbedded throughout your case study.

For each competency there is an accompanying descriptor, guidance statement and prompts to aid your thinking. The descriptor defines the competency, the guidance statement explains how to demonstrate the competency and the prompts are an indication of how you will be assessed.

For more information on each competency, please see Sections C1. onwards.

You must demonstrate all competencies for your PCS to be successful. Please note, if you use more than one case study, you do not need to demonstrate all of the competencies in both the case studies. You are free to select those case studies you consider best demonstrate your achievements.

The assessors will assess your PCS against each of the competencies ensuring that you have demonstrated the **minimum** type of evidence required stated below:

Competency	Type of evidence for Associate membership
C1. Professionalism and the RTPI Code of Conduct	Core
C2. The spatial planning context	Understanding
<i>C3-C6. Required for routes to Chartered membership only. Included here for information: C3. Identifying and analysing issues (Application) C4. Gathering appropriate information (Application) C5. Identifying and analysing a course of action (Application) C6. Initiating and implementing a course of action, or, for academic applications, dissemination of knowledge (Application)</i>	
C7. The legal framework	Awareness
C8. Ethical challenges	Awareness
C9. The political framework	Awareness
C10. The economic context	Awareness
C11. Reflection and review	Understanding
C12. Sustainability	Understanding

C1. Professionalism and the RTPI Code of Conduct (Core)

Descriptor

Associate membership of the RTPI is a partial professional qualification giving professional recognition. In line with the RTPI Code of Professional Conduct, Associates should demonstrate their commitment to good practice, including respect, tolerance, confidentiality and honesty.

Part of being a professional includes liaising and cooperating with others and may require the use of different communication methods tailored to the audience. This should come through in recognising the need to act in the public interest. Associates should also show an understanding of equality, diversity and inclusive planning in all their activity. Negotiation, mediation, influence and advocacy are also key attributes.

Guidance statement

To demonstrate this competency, professionalism and adherence to the Code of Professional Conduct must be evident throughout your case studies. You must also provide a specific example in at least one of your case studies as to how the Code of Professional Conduct applies to your work. You should evidence a clear sense of professional responsibility for your own actions and how your performance impacts on others. This may be in relation to conflict of interest, disclosure, professional conduct, discrimination, fees or any other issue covered by the Code of Professional Conduct.

For example, you might show an understanding of equality and diversity by explaining how you adapted a consultation process. Or you might explain how you responded to a potential conflict of interest at work, dealt with commercial confidentiality or responded to complaints.

Just mentioning the Code without explaining the context and its implications will not result in a successful application. While demonstration of this competency may overlap with other competencies (in particular ethical challenges), you are still expected to demonstrate this competency separately.

Please remember, professionalism also relates to the standard of your submission and quality of your work as set out in [Section 3.2](#). This will be formally assessed under 'general presentation'.

Prompts

- Have you demonstrated professional characteristics including the importance of upholding the highest standards of behaviour?
- Have you demonstrated how the Code of Professional Conduct impacts on your work in professional practice and why it is important?
- Is this competency integral to your approach throughout your case study?

C2. The 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.

Guidance statement

To demonstrate this competency you need to show an understanding of how planning relates to local communities, the natural environment and other professions. You should also demonstrate your understanding of the spatial element of planning and the relationship between a site or area and the surrounding areas, and how this relates to other local and strategic activities such as infrastructure provision.

For example, you might explain your understanding of how planning decisions impact on other built environment professionals, such as those working in housing. Or you might demonstrate your understanding of broader spatial planning issues such as environmental, social, economic or design issues and inclusive planning. You might explain your knowledge of issues beyond traditional land-use planning such as inequalities in health, education and access, energy policy, urban design or the rural economy.

Prompts

- Have you set the scene and background for your case study succinctly?
- Have you shown your understanding of broader spatial planning issues?
- Have you demonstrated an understanding of the inter-relationships between different stakeholders involved in your case study?

C7. The 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, when legal judgements are made by the courts, or policy is revised by central or local government. It is important to have awareness of the current legal framework.

Guidance statement

To demonstrate this competency you need to show your awareness of the legal framework within which you operate and how it can impact on planning. This could include referencing the title of a relevant Act or other statute in your submission and explaining how you have become aware of it.

Alternatively, you might explain how you have observed the delivery of a planning solution that met relevant statutory and regulatory requirements. You could also explain how you have observed decisions being made which comply with legal requirements; or any changes that needed to be made as a result.

Prompts

- Have you demonstrated your awareness of the implications of a relevant Act or other statute?
- Have you explained your awareness of planning decisions made to comply with the legal framework?

C8. Ethical challenges (Awareness)

Descriptor

The nature of planning work means that professional planners are faced with ethical challenges. They must understand and act appropriately given the sometimes conflicting requirements of their employer, the needs of the individuals affected, the collective needs of the community and their own personal views. All planners need to understand how to behave in situations where their ethical and moral behaviours are tested.

Guidance statement

To demonstrate this competency you need to show your awareness of ethical challenges and how these can impact on planning. You may want to consider a situation where someone has had to balance personal and professional views and navigate the situation using their professional judgement. You need to show awareness of why this was an ethical dilemma: for example, it could be a situation where you or a colleague has been asked to disregard the outcome of a consultation process or ignore a consultation response; or may have been offered a personal inducement to support a particular outcome on a planning application.

When thinking about what is an ethical challenge, it maybe helpful to remember that issues such as “balancing decisions on the use of land” are a core part of the planning decision process and not an ethical consideration.

Prompts

- Have you shown your awareness of why the situation was an ethical challenge?
- What were the conflicting requirements, or the type of pressure applied in the situation?

C9. The political framework (Awareness)

Descriptor

The planning process and its outcomes often come under scrutiny, nationally and locally, 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. Consequently, any practitioner should see the need for a clear and ongoing understanding of the political framework in which planning operates.

Guidance statement

To demonstrate this competency you need to show an awareness of the political environment and how this can impact on planning. For example, this could include awareness of engaging with elected officials, explaining how a planning committee operates, or being aware of times where elected officials have overturned planners’ recommendations.

Or you could show your awareness of how an argument might be adapted to suit a particular political audience.

Prompts

- Have you explained your awareness of the political nature of planning?
- Have you identified the political context within which you work?

C10. The economic context (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 understanding 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.

Guidance statement

To demonstrate this competency you need to show your awareness of the economic or financial issues relating to spatial planning decisions. This might include showing your awareness of a particular model or strategy for financing development, or of how development needs to be financially viable for those promoting it.

Prompts

- Have you demonstrated your awareness of the economic or financial context of your case study?
- Have you shown an awareness of how planning can generate added value?

C11. 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” (Schön 1983, p26). 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 Associates to regularly reflect on learning through the Code of Professional Conduct and its CPD requirements.

Guidance statement

To demonstrate this competency you must show you understand the importance of reflection and review within planning practice, for example by reflecting on a project and its outcomes. This might include identifying, within your case study, what could be done differently to achieve better outcomes. You might include your understanding of how reviewing outcomes, for example with colleagues, might change how things are done in future. This competency is about showing you understand that practising planners always need to reflect on what they can do differently and how they can develop.

Prompts

- Have you shown your understanding of how critically reflecting on a piece of work or a project can help bring about different results in the future?
- Have you shown your understanding of the benefits of reviewing behaviours, actions and performance?
- Have you demonstrated your understanding of why a commitment to continuous reflection is important for the development of professional skills and knowledge?

C12. Sustainability (Understanding)**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 and cultural and/or historic heritages for transmission to future generations.

Planners need to understand the implications of climate change for places (such as the climate hazards an area may face, and their social and economic costs and consequences) and how planning is critical in responding to the challenges posed by climate change. For example, planning can help to shape patterns of urban and rural development, mitigate against the increased risk of flooding, reduce energy demand and carbon emissions from the built environment, improve air quality and support integrated sustainable forms of transport and energy consumption. Better mitigation and adaptation to climate change is crucial to a sustainable economy and society.

Guidance statement

To demonstrate this competency, you must demonstrate your understanding of sustainability in the context in which you are practising. You must show your understanding of how planning relates to all three dimensions of sustainability and in particular how it can address the implications of climate change.

Planning outcomes may have different impacts on different communities so it is important to consider the long term impacts of planning decisions. The costs and consequences of climate change affect poorer or more vulnerable communities most. When considering the effect on different communities, you should also demonstrate your understanding of how planning outcomes can be designed to address issues of disadvantage.

Some of the ways you could demonstrate your understanding include:

- Explaining how getting a site in the right place and using the inherent qualities of the site can help achieve sustainability (e.g. drainage, passive solar).
- Reflecting on the role of planning in achieving sustainability not just in terms of the environmental aspects of building design but also the social ones, such as lifetime design, inclusive planning, accessibility and meeting the different needs of the community.
- Explaining how local planning policies can play a role in reducing the need to travel (particularly by private car) and/or in ensuring a high proportion of trips are made by sustainable transport modes (which could include public transport, walking and/or cycling).
- Explaining how planning can play a role in cutting carbon or other greenhouse gas emissions at strategic, local/neighbourhood and development site levels.

- Explaining how infrastructure planning can address climate change (for example through renewable energy production, energy and transport networks, water and waste).
- Demonstrating your understanding of the role planning plays in climate change mitigation and adaptation.
- Demonstrating your understanding of how planners can reduce emissions from existing stock (e.g. through building design, energy distribution networks or the use of energy efficient materials) as well as from proposed development.

Prompts

- Have you demonstrated how planning decisions affect sustainability and the way they can mitigate against the effects of climate change?
- Have you demonstrated the economic, social and environmental dimensions of sustainability and the role that planning plays?
- Have you demonstrated how planning decisions affect different communities?
- Have you demonstrated how planning outcomes can be designed to address issues of social inequality?
- Have you explained the challenges that planners might face in balancing the three dimensions of sustainability and how they might be addressed?

NOTE

Go back over your PCS and check (for your own reference) where you have addressed each of the competencies. If you can't find the reference, don't expect the assessors to.

6. Professional Development Plan (PDP)

This is the third section of your written submission. The purpose of the PDP is for you to demonstrate the ability to analyse your professional learning needs and develop a plan to cover any gaps in your knowledge and skills. The recommended word count for this section is 1,500 words.

6.1 Why is the PDP important?

The RTPI believes that one of the most useful pieces of Continuing Professional Development (CPD) you can do is to carefully prepare a PDP. CPD is the way in which professionals maintain and develop their expertise via an ongoing process of learning through planning and reflection ([Section 6.5](#) contains a list of types of CPD activities).

All members entering the profession are required to begin a habit of lifelong learning and 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 cycle.

This focus on lifelong learning that leads to a reflective and analytical professional is embodied in the RTPI Code of Professional Conduct, by which Associates are bound. The Code states that members should:

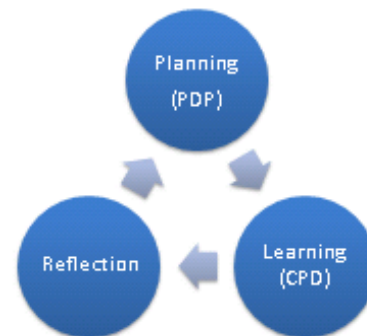
- a) at least once a year prepare a PDP for the next two years identifying their personal professional development needs;
- b) in any two year period undertake a minimum of 50 hours' CPD activity related to the undertaking or managing of town planning;
- c) maintain a written record of their CPD activity.

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

Getting into the habit of preparing your PDP as an Associate is particularly useful for you if you want to go on to become a Chartered Member through the A-APC. Getting it right now will stand you in good stead for the future.

Please note that every year we carry out an audit of PDP and CPD records from a randomly selected sample of our membership. For more information on CPD monitoring please visit the [RTPI website](#).

CPD cycle



NOTE

Don't treat your PDP as a last minute add-on to your submission. It is as important as the PES and PCS and more candidates are asked to resubmit this section than any other. Give this part of your submission equal consideration. The Code states that members should prepare a PDP at least once a year.

6.2 Structure and scope of the PDP

The PDP structure starts with a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis looking at your current personal strengths and weaknesses as well as the opportunities and threats that could impact on your ability to meet your career goals. The SWOT is followed by an Action Plan that consists of a hierarchical structure of a goal, objectives and actions:

- A goal is the overarching, long-term and strategic outcome for the plan. The goal should outline what you will be able to do or be as a professional in two years' time, as a result of carrying out your plan.
- The objectives then narrow down and identify the developmental areas of knowledge and skills you will need to gain to achieve your goal.
- 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 model outlined in [Section 6.4](#)).

The RTPI has produced a PDP template (explained in detail in [Section 6.4](#)) that you must use to ensure that your PDP follows the correct format.

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.¹⁰ It is better to explain what level you expect to be working at in terms of the level of responsibility you will have and the type of work you will be doing.

Some of your objectives may be the same as those identified in any work-based staff development scheme. However, your overall ambitions are likely to be wider than meeting the requirements of your current role and you should use your PDP to plan your own professional development. Note that your PDP must focus on your own professional development and not on developing the business or organisation. 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 evaluate all your CPD activities against carefully identified needs.

6.3 Checklist for the PDP

Your PDP will be assessed on the following elements:

- That there is a SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis which can be seen to be clearly connected in the main to the PES/PCS. However, this does not mean that every item in the SWOT must be linked to the PES/PCS.
- That the majority of weaknesses identified in the SWOT are addressed in the Action Plan, however, it is recognised that not all weaknesses can be addressed in the timescale of the PDP.
- That one to two goal(s) are identified. These must relate to the PES/PCS. Each goal must have two to four objectives which focus on skills and knowledge and two to four

¹⁰ Updating your CV or applying for jobs would not be appropriate actions or objectives as they are processes and do not directly result in you furthering your skills or knowledge.

SMART (Specific, Measureable, Achievable, Relevant and Time-based) actions per objective.

- That the PDP has a balance of planning and non-planning skills, with at least 50% being planning. Objectives may be directly related to planning skills or knowledge. However, they do not have to be exclusively focussed on planning skills. Improvements in professional skills such as negotiation, presentation or management are acceptable as long as these are within the context of your planning career aspirations.
- There is an Action Plan which must be SMART (explanation in the template in [Section 6.4](#)).
- That the PDP template which is available on the [RTPI website](#) has been used.
- That the PDP covers the period two years onwards from the date of your submission. It must be forward-looking. For example, if you submit at the end of April 2017 your PDP should run from the start of May 2017 to the end of April 2019.
- That the PDP is within the word limit for the submission (guide of 1,500 words)¹¹.

Each of these points must be met for the PDP to pass, otherwise you may be asked to resubmit your PDP or be required to enter a supplementary support phase.

NOTE

You are not required to get your line manager to corroborate your PDP although you should indicate that you have line manager support for any actions which require it (e.g. attendance on a training course in work time).

6.4 PDP template outline with guidance notes

In this section, a copy of parts of the PDP template is provided in order to give examples, along with guidance notes. The full template is on the [RTPI website](#).

PART ONE – SWOT ANALYSIS

NOTE

You do not need to give an overview of your role at the start of the PDP, this has already been covered in the PES and PCS.

Develop a SWOT analysis based on your written submission. Your written submission looked back at your achievements over the past few years while the SWOT analysis is looking forward.

¹¹ The word count for the PDP **only** includes the text you enter into the template.

<p>Strengths</p> <p><i>Be confident about what you're good at – use them to inform your goals in part two.</i></p> <p><i>You might include:</i></p> <ul style="list-style-type: none"> • area of strong planning knowledge and understanding • strong transferable skills and competencies • commitment to personal and professional development • good contacts or successful networking 	<p>Weaknesses</p> <p><i>Most “weaknesses” that you identify should be used to form goals, objectives and actions in part two. You are expected to address the majority of the weaknesses you have identified.</i></p> <p><i>There should be a clear link between your “weaknesses” and the goals, objectives and actions identified and the majority should be based around planning knowledge, skills or experience.</i></p> <p><i>List only 3 – 5 weaknesses – this is enough. You need to justify which weaknesses you are taking forward into the action plan and why.</i></p> <p><i>You might include:</i></p> <ul style="list-style-type: none"> • areas of weakness in planning knowledge and understanding • underdeveloped transferable skills and competencies • understanding that there is more to planning than your current experience
<p>Opportunities</p> <p><i>Consider what opportunities can be integrated into a goal in part two.</i></p> <p><i>You might include:</i></p> <ul style="list-style-type: none"> • opportunities within the industry • opportunities within your organisation • training and professional development opportunities • support of RTPI (Regions & Nations, Young Planners, Networks etc.) • opportunities to volunteer 	<p>Threats</p> <p><i>What threats could affect your ability to meet your career goals?</i></p> <p><i>You might include:</i></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

Please use the information from your SWOT to identify goals and objectives for Part Two.

PART TWO – GOALS, OBJECTIVES & ACTION PLAN

For each goal you intend to achieve, you need to develop objectives and an Action Plan which must be fully SMART. Please ensure you are familiar with SMART planning before starting your action plan.

Please complete one to two goals; two to four objectives per goal; and two to four SMART actions per objective. *You may delete the goals, objectives and actions in the template as necessary.*

You are not expected to get your line manager to corroborate your PDP but you should gain their support for actions beforehand, if required.

GOAL

Where do I want to be professionally?

Your goal should be a high level strategic statement of what you want to achieve. Your goal should be clearly set in the context of furthering planning skills and knowledge. It should specify the end result, the output of completing the action plan. What will you be able to do or be as a result?

Consider the question: as a professional, what direction do you want your career to move in over the next two years?

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) and/or the level you would like to be working at. 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.

You must identify between one to two goals.

OBJECTIVE

What outcome will help me achieve this goal?

Objectives are sub-goals with measurable outcomes that you expect to help you achieve your goals. They are therefore a way of breaking down your longer term goals so that you can begin to work towards or prepare for it. The objectives should define the areas of knowledge or types of skills that you will need to gain to meet your goal. They must relate to your goals and/or the areas of development identified in your SWOT.

Achieving your long term goal might depend on improving your performance in certain ways or addressing areas of weakness identified in your SWOT.

While you are encouraged to set a goal that reflects a longer time frame, objectives should be more focused and contribute to your overall long term goal and are likely to be addressed in the next 6-18 months. It is therefore important also to break down the longer term goal into shorter term objectives, and in turn identify realistic Action Plan activities to achieve these in a set time-frame.

For each goal, you must identify two to four objectives.

ACTION PLAN:

You must ensure that your actions are specific, measurable, time-bound steps that can be taken to meet your goal. Every action must conform to the SMART model, failure to do so will result in an unsuccessful plan.

S – specific (be precise in the ‘Action’ column below)

M – measurable (see examples under ‘How will I know if I have achieved it’ below)

A – achievable (can you achieve this or is it an unrealistic goal, given time and other pressures?)

R – relevant (to you in your work setting)

T – time-based (specific dates)

Include constructions such as:

In order to..., With a view to ..., So that I can..., Which will allow me to....

Your Action Plan shows a list of actions you will take to achieve each objective. They will answer questions such as:

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

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. An indication of a good Action Plan is if it is detailed enough for someone else to implement.

For each objective, you must identify two to four SMART actions in the columns below.

Action	How will you measure your learning?	Start and end dates
<i>Clearly identify what action (CPD activity) you will undertake to achieve your objectives in order to achieve your goal.</i>	<i>Some examples of how you might measure your learning are listed below:</i>	<i>Give specific months and years.</i>
<i>Work based learning is acceptable, but you must highlight what it is you will learn from it (e.g. how taking on a new area of work will develop specific knowledge and skills).</i>	<i>I will discuss results of my research with colleagues at a team meeting and ask for feedback.</i>	<i>Be more specific than simply “ongoing”.</i>
<i>Ensure that you have done the relevant research into your actions (e.g. what further reading can you access, what volunteering opportunities will be available).</i>	<i>I will feel more confident doing X and this will be noticed by my manager.</i>	
<i>Link your action to your awareness of lack of knowledge and/or skills identified in part one, if appropriate.</i>	<i>I am able to use my new knowledge of X to advise clients on Y.</i>	
<i>If you are listing a course, be specific about which course, where, who is paying for it, what you hope to learn from the course and what you will do with this learning. Consider if you need your manager’s approval or your organisation to fund the action.</i>		

6.5 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 enquiries 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.

7. Tips for a successful application

- Read the guidance: understand what you need to demonstrate in your submission.
- Use the resources available to you: other professionals, mentors, colleagues, online resources and events.
- Check off all the competencies: have you addressed each competency in your submission?
- Select your case studies carefully: which case studies best demonstrate how you meet the competencies?
- Be critical: don't be afraid to explain how you would do things differently if you were doing a task again.
- Remember your PDP: refer to the PDP checklist to make sure you meet all of the requirements.
- Prepare: don't leave your submission until the last minute before the deadline.
- Review your submission: give it to someone who has never read it before – how do they think it reads?

Thank you for taking the time to read this document and good luck with your submission.

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