

# BECOMING CHARTERED:

## Assessment of Professional Competence (APC)

**Steve Mattin**

Membership Manager

RTPI SW CPD Day  
21 May 2019  
Exeter





# Why Join?

## Why Chartered?

Hallmark of professional expertise and integrity.  
Recognised by employers, clients and the public.  
Use designatory letters MRTPI and logo.

## Why Associate?

Partial qualification.  
Step towards Chartered.  
Designatory letters AssocRTPI and logo.  
For those engaged in planning.

## Take advantage of your membership...

The Planner and online news digest.  
Monthly member e-bulletin  
RTPI Networks.  
Planning Policy and research reports.  
CPD and networking events - discounts.  
Career advice and guidance.  
Consumer discounts - RTPI Plus.



# Value of membership

## Professionalise the profession.

- Opportunity to shape and influence policy.
- Takes the risk out of recruitment for your employer.
- Cost effective continuing professional development (CPD).
- Flexible payment options - reduced subscriptions, quarterly direct debit.
- Subscription rates reflect our members work largely in public sector.

£25 a month\*

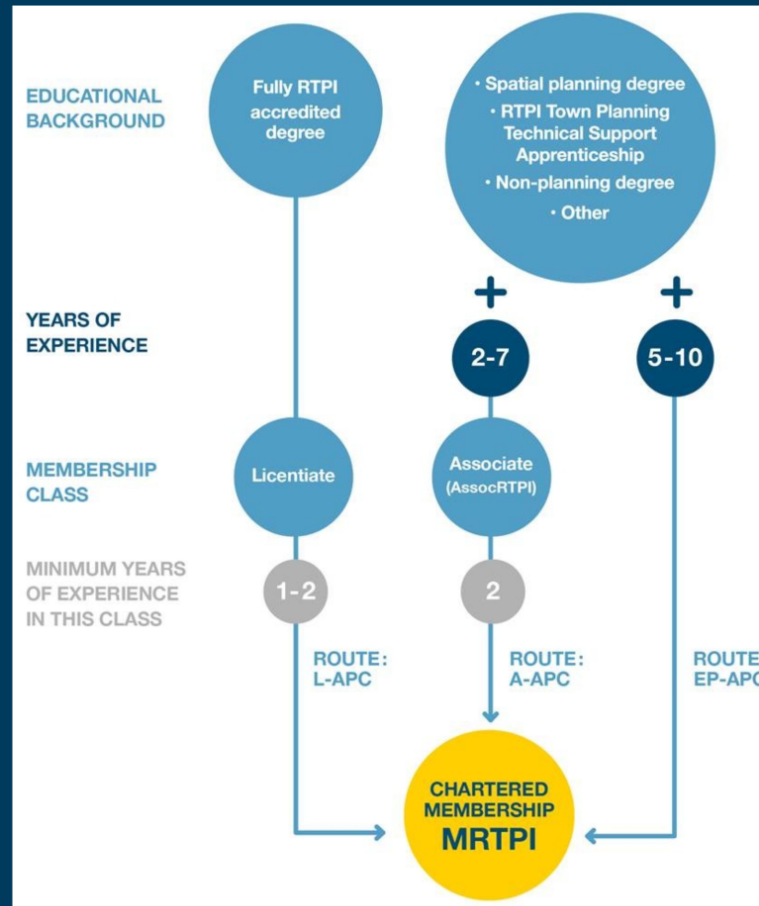
\*Based on 2018 Chartered membership subscription rate.





# Routes to Membership

Licentiate  
APC

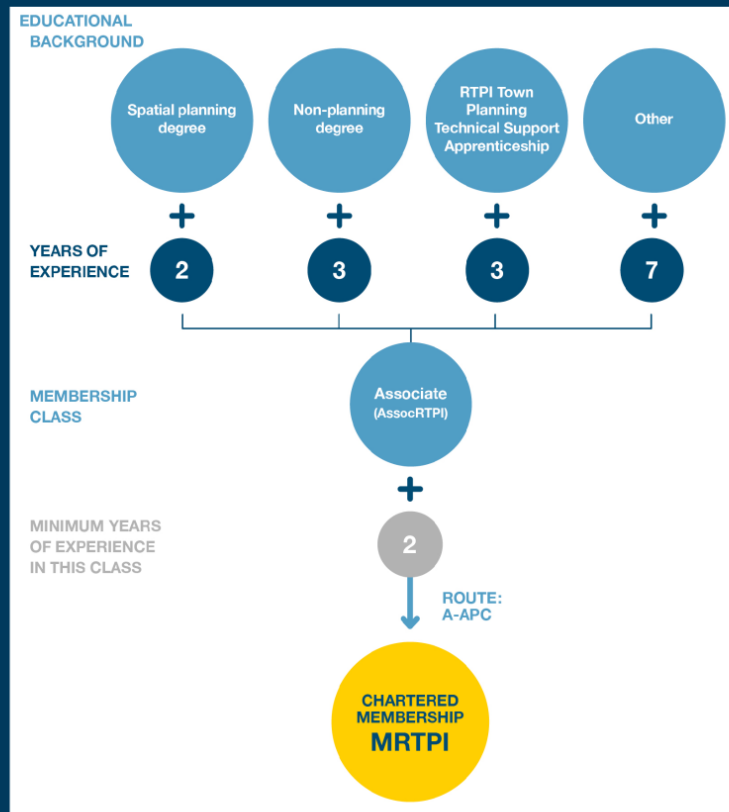


Experienced  
Practitioner  
APC

Associate  
APC



# Associate APC



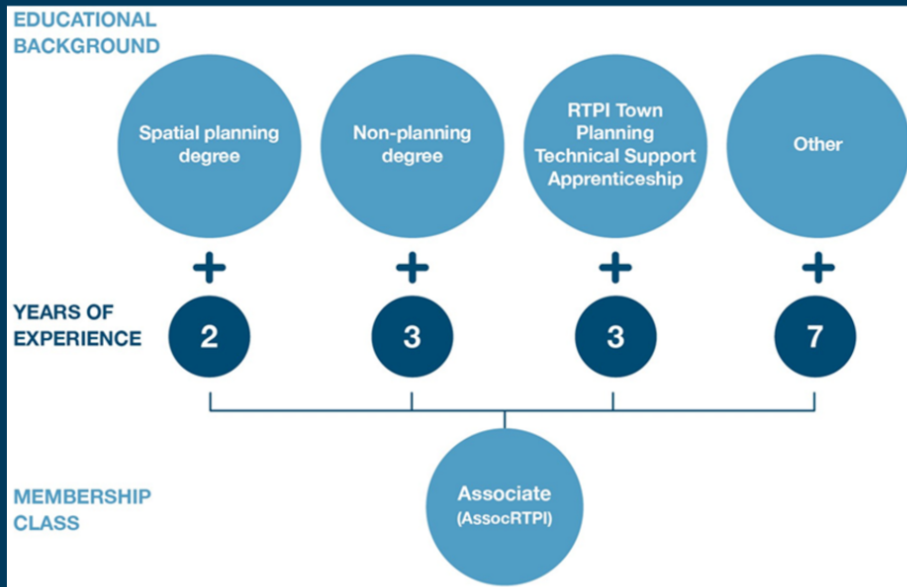
## Route without a fully accredited qualification

- For early career planners without a fully RTPI accredited qualification.
- Up to 1 year experience can be pre-qualification

Associate  
AssocRTPI



# Associate membership



- 4,000 word written submission.
- Prepares you for APC.
- Competencies required at lower level than Chartered.

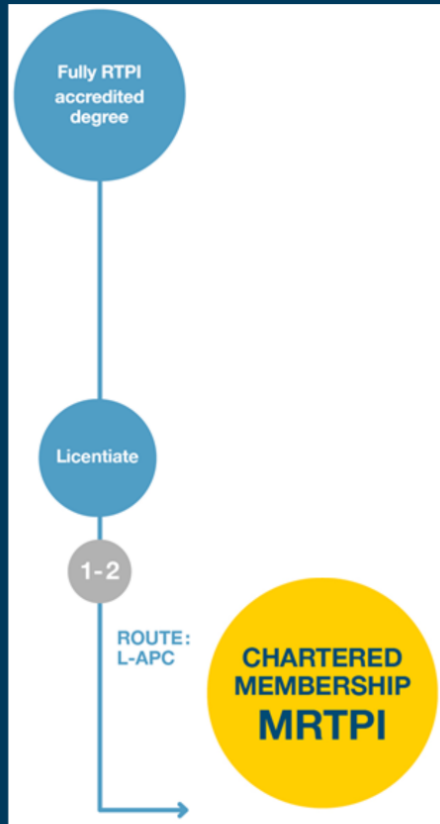
Spatial planning degree?

## Statement on planning degree

- Planning degree, not RTPI accredited.
- 500 word statement.
- 
- Degree transcript required.
- Degree must meet 6 principles:
  - social science as analytical framework
  - land use and transportation
  - design and place
  - environmental challenges
  - legal and institutional frameworks



# Licentiate APC



## Route for fully RTPI accredited graduates.

- 2 years planning experience required.
- At least 1 year of experience as a Licentiate.

Licentiate

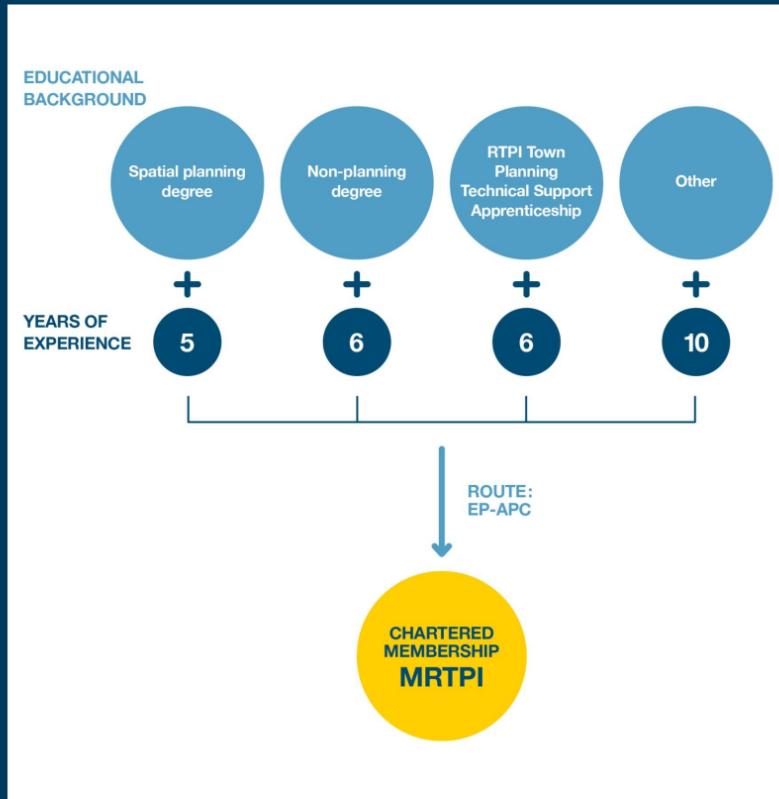


## Licentiate membership

- Holding class for those working towards Chartered.
- Abide by the Code of Professional Conduct.
- Short application and proof of course completion required.
- [www.rtpi.org.uk/licentiate](http://www.rtpi.org.uk/licentiate)



# Experienced Practitioner APC



Route for established professionals.

All experience needs to be gained post-qualification.

Associates and Licentiates can apply.

Spatial planning degree?

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# Supporting Documents

**Examples of  
Professional  
Work**  
(EP-APC)

**Corroboration,  
Sponsor,  
Forms**  
(All)

**Log Book**  
(L-APC A-APC)

# Examples of Professional Work (EP-APC)

- Examples of your work to support claims in PES and PCS.
- E.g. written reports, planning applications, minutes of meetings.
- Think confidentiality - redact as appropriate.
- Cross-reference to written submission.
- Keep focused - submit extracts as appropriate.
- 5-10 examples required.



# Corroboration, Sponsor, Forms

- Employers must read application and verify claims (corroboration).
- Corroboration must be on company letterhead or from company email address.
- Self employed candidates - corroboration from clients.
- Sponsorship by a Chartered Town Planner.
- Corroborator and sponsorship forms on RTPI website must be used.
- Application forms to capture personal details.



## Log book

- Representative overview of your experience.
- Provides assessors with context.
- Minimum of 12 months' recent experience whilst a Licentiate or Associate (full-time equivalent).
- Cross-reference to written submission.
- Captures your experience as it happens.

Template

Examples

### Log Book Template



[The log book is to be completed on at least a monthly basis by all those working on their Licentiate or Associate Assessment of Professional Competence (L-APC / A-APC).

Period of review (month/year)..... Membership Number:.....

Date	Nature of Professional Work or Task Undertaken	What skills or competencies has this work developed?*	What knowledge and understanding has been gained or developed as a result of this work?*	What skills or knowledge do you feel you need to develop?

Nature of Professional Work/Task Undertaken	What skills/competencies has this work developed?	What knowledge/understanding has been gained/developed as a result of this work?	What skills/knowledge do you feel you need to develop?
<p><b>Objection to a planning application.</b></p> <p>I was asked by a senior colleague to write a letter of objection to a planning application. We were submitting the letter of objection on behalf of our client who lived next door to where the application was proposed.</p> <p>The application involved the erection of a replacement dwelling considerably bigger than the existing. It was also located within an area of special landscape character as identified on the proposals map.</p>	<p><b>Identification of Issues &amp; Using Appropriate Research Methods</b> – It soon became apparent that the applicant's case centred upon the interpretation of paragraph 55 of the NPPF and whether the creation of the new dwelling could be said to be 'truly innovative'.</p> <p>With the NPPF providing limited elaboration upon what this term means, I used a compass search to find appeal decisions that have been made post NPPF involving paragraph 55. This provided a key part of the evidence that I used to support my case.</p> <p><b>Time Management</b> – Time management was critical on the project as there was only a week left to run on the statutory consultation period.</p> <p><b>Aesthetic and Design Awareness</b> – Having identified the extent to which the proposals were seen to meet paragraph 55 of the NPPF as being crucial in the argument, my colleague suggested that as part of our argument we should draw upon the thoughts of a Landscape and Visual Impact consultant to bolster our argument. Their knowledge and experience has allowed me to gain a greater understanding for design.</p> <p><b>Project Management</b> – The work produced by the Landscape and Visual consultant was key to our case, as such, it was important that they were set clear objectives and instructions to ensure that timescales are met.</p> <p><b>Written Communication Skills</b> – I wrote the letter of objection which helped me developed important skills for writing to persuade.</p>	<p>I am feeling more confident in talking to clients and responding to their questions on a daily basis. I also feel more confident in instructing and directing sub consultants.</p> <p>I have a much greater understanding of paragraph 55 of the NPPF and the tests that need to be established in determining whether a design can be said to be truly innovative.</p> <p>I know that it is important to manage client expectations when writing objections on behalf of clients.</p> <p>I realise the importance of drawing upon the expert knowledge of others in helping to build a case for a planning application. To use them is not a shortcoming of your own knowledge but helps in justifying your own case.</p>	<p><b>Resource Management</b> – I need to think more critically about what other resources, beyond that immediately available to me, I need in order to undertake tasks effectively. Having a landscape architect review the proposals gave our argument additional weight beyond that as planners we could comment on. I need to appreciate the wider network of specialists that can support planners in making their arguments.</p> <p><b>Time Management (Fees)</b> – I ended up spending more time on the project than the total fee that had been assigned for us to do the work. I need to ensure that I translate fee budgets into the amount of time that is available to resource a project to ensure I use client's time appropriately.</p>

Poor example

Nature of Professional Work/Task Undertaken	What skills/competencies has this work developed?	What knowledge/understanding has been gained/developed as a result of this work?	What skills/knowledge do you feel you need to develop?
Processing planning applications	Research, delivering – making it happen, communication	Planning Law	Further knowledge of planning law
Regional CPD event – Development Control	Effective networking	Knowledge of development control policies	To apply information from CPD event to my daily employment
Contacted consultant with regard to listed building regulations	Research – finding a consultant; communication skills	The limits of my own responsibility for specialist applications	More knowledge of listed building regulations
Site visits	Data collection, investigation and research; quantitative and qualitative analysis and appraisal	That it is useful to have first hand knowledge of a site involved in an application	None – successfully achieved all elements
Answering telephone calls from the public	Negotiation, mediation and advocacy; relationship building; ethics of good practice	Knowledge of the relevant areas of planning law	Telephone skills
Preparation and submission of representations objecting to a draft SPD relating to developer contributions at the borough council.	<i>Problem solving skills</i> – via the research and collection of data in relation to the draft SPD. <i>Communication skills</i> – via the preparation of written representations in the form of a letter to the Local Authority.	Knowledge of the written form required for the submission of written representations.	Further practice of submitting representations to improve my competency and efficiency.

# Written Submission

**PES**

Summarise experience

**PCS**

Demonstrate competence

**PDP**

Look ahead





## Practical Experience Statement (PES)

Tests if you have sufficient planning experience.  
Right amount, type and level.

Using your professional judgement in planning work.

For each period of experience you should include:

- The type of employer
- Description of role
- The type of planning work

What  
experience  
counts?

Experience  
types



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### Experience that **counts**:

- Full or part time or a combination of both (pro rata).
- Paid or voluntary.
- Experience gained in the UK or overseas.
- Non-continuous experience.
- Experience gained whilst undertaking a degree or further studies\*

### Experience that **does not count**:

- Less than three months full-time equivalent in duration.
- Administrative or technical support.

\*Not including 1 year intensive Master's course



- The preparation of plans, policies and related documents
- Plan implementation
- Monitoring and research
- Teaching / academic
- Specialist experience.



## Professional Competence Statement (PCS)

Tests your decision making, knowledge, skills and values.

- Use case studies to show competence.
- Reflective, critical and analytical statement of your work.
- Not just about the what – but the why and how.
- Use first person "I..." to be clear about your contribution.

Case Studies

Evidence  
Types

Chartered  
Competencies  
ALL

Chartered  
Competencies  
ADDITIONAL

Associate  
Competencies



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- A specific project, application or phase of a project. Get the scale right.
- Not a process or area of work.
- Select case studies which were challenging for you.
- Not being judged on importance of case study. Nationally significant project vs. dormer window - it doesn't matter.

A minimum type of evidence is required to demonstrate each of the competencies:

1. **Core:** Demonstration of how the competency is integral to your actions. Beyond application, should be core to how you operate – imbedded throughout the case study.
2. **Application:** Personal experience is essential along with evidence of depth of knowledge of the competency.
3. **Understanding:** Personal experience is not essential, however, your understanding of how and why the competency applies to the case study should be apparent – observational or theoretical.

## Chartered competencies 1 - 11

- C1. Professionalism and the RTPI Code of Conduct (Core)
- C2. The spatial planning context (Application)
- C3. Identifying and analysing issues (Application)
- C4. Gathering appropriate information (Application)
- C5. Identifying and evaluating a course of action (Application)
- C6. Initiating and implementing a course of action or dissemination and application of knowledge (academic) (Application)
- C7. The legal framework (Understanding)
- C8. Ethical challenges (Understanding)
- C9. The political framework (Understanding)
- C10. The economic context (Understanding)
- C11. Reflection and review (Core)

C1

C2

C3

C4

C5

C6

C7

C8

C9

C10

C11



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## C1 Professionalism and Code

Confidentiality    Written terms of engagement

RTPI Code of Conduct (specific reference required)

Respect for others

Conflict of interest

Fearless, impartial professional judgement





## C2 Spatial planning context

### Spatial element of planning

How planning relates to communities, environment, other professions

### Impact on stakeholders

### Background / scene setting

Consider broader issues e.g. inequalities in health

Spatial planning theory (EP-APC only)



## C3 Identify and analyse issues

Define and solve problems

Evidence based decisions

Impact on case study

Weigh up issues      Use your judgement

Procedural, technical, other issues

## C4 Gathering appropriate information

Your information gathering strategies

Plans, statistics, public consultations

Impact on case study

Desktop, site based research

Interrogate and evaluate information

Challenges in obtaining data

## C5 Identifying and evaluating a course of action

Evaluate alternative approaches

Option A, Option B, Option C...

Articulate your thought process

Develop plans, recommendations, advice

Explain why alternatives rejected

Professional level

## C6 Initiating and implementing action

Put ideas into practice

Make recommendations / advice happen

Stakeholder mediation

How you move case study forward

Negotiate agreements

## C7 Legal framework

Implications of law on your case study

Explain how decisions comply

Translate legal requirements for others

Specific legislation / Acts / statutes

## C8 Ethical challenges

Explain how it was a challenge

Moral / ethical dilemma

Pressure

Conflict of interest

Not just RTPI Code

Discomfort

Do online ethics module



## C9 Political framework

# Public pressure

Influence on policy or planning outcomes

Political context of organisation

How framework informed your approach to case study





## C10 Economic context

Weigh up economic or financial issues against other considerations

E.g. impact of design or density requirements on scheme

How planning influences deliverability

E.g. implications of infrastructure required upfront

Not about prioritising economics

## C11 Reflection and review

Evaluate success of case study

Explain what you learned

Improve future practice

Link to PDP weaknesses

What went wrong?

## Chartered competencies 12-15 (EP-APC and A-APC only)

C12. Sustainability

C13. Engagement and participation

C14. Specialist knowledge and its relationship to spatial planning

C15. Leadership in spatial planning (OPTIONAL)

C12

C13

C14

C15  
OPTIONAL



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## C12 Sustainability

Balance economic, environmental, social

How you address implications of climate change

E.g. Develop policies to support sustainable transport modes  
Consider long term impacts

Challenges in balancing dimensions of sustainability

E.g. Reduce emissions from existing stock



## **C13 Engagement and participation**

Address issues of disadvantage

### Equality-proofing

Reach out to wider community (not just stakeholders)

Evaluate obstacles to engagement

Recognise how planning decisions affect different groups

Tools / techniques that support engagement



## C14 Specialist knowledge

Detailed technical knowledge

E.g. Development Management, transport planning, urban design, housing

Situate specialism within wider context

Make links to other specialist areas



## C15 Leadership (OPTIONAL)

For those with 5 years+ experience working at senior strategic level

### Replaces C3-C6

Show leadership in overcoming planning challenges

PES must evidence senior experience

How you motivate others with your advice, actions

Mentoring

Thought leadership



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## Associate competencies

- C1. Professionalism and the RTPI Code of Conduct (Core)
- C2. The spatial planning context (Understanding)
- C7. The legal framework (Awareness)
- C8. Ethical challenges (Awareness)
- C9. The political framework (Awareness)
- C10. The economic context (Awareness)
- C11. Reflection and review (Understanding)

C1

C2

C7

C8

C9

C10

C11

C12



## C12 Sustainability

Balance economic, environmental, social

How you address implications of climate change

E.g. Develop policies to support sustainable transport modes  
Consider long term impacts

Challenges in balancing dimensions of sustainability

E.g. Reduce emissions from existing stock



# Professional Development Plan (PDP)

Tests your commitment to lifelong learning.

PDP template must be used.

Part 1 (SWOT): Analysis of current developmental Strengths, Weaknesses, Opportunities, Threats

Part 2 (Looking forward): Goals, Objectives and Action Plan for the next two years' CPD

SWOT

Goals  
Objectives  
Actions

## PART ONE – SWOT ANALYSIS

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.

<b>Strengths</b> <ul style="list-style-type: none"><li>• [ ]</li><li>• [ ]</li><li>• [ ]</li><li>• [ ]</li></ul>	<b>Weaknesses</b> <ul style="list-style-type: none"><li>• [ ]</li><li>• [ ]</li><li>• [ ]</li><li>• [ ]</li></ul>
<b>Opportunities</b> <ul style="list-style-type: none"><li>• [ ]</li><li>• [ ]</li><li>• [ ]</li><li>• [ ]</li></ul>	<b>Threats</b> <ul style="list-style-type: none"><li>• [ ]</li><li>• [ ]</li><li>• [ ]</li><li>• [ ]</li></ul>

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

**SMART  
Actions**

**Goal?** Long term strategic statement e.g. level you'll be working at, type of work you'll do, area you'll be working in.

**Objective?** Specific developmental area to help achieve your goal.

**Actions?** SMART continuing professional development (CPD) activities that will help you achieve objectives.

**Example**

**Exercise**



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All Actions **must** be SMART

**Specific:** Include the specific details of the CPD activity

**Measurable:** How will the learning be tested?

**Achievable:** Include manager approval / back up plans

**Relevant:** Relate to their development and the objective

**Time based:** Set a time frame (with both a start & finish / review date)

### GOAL 1

I will have developed my coaching skills and experience to launch a coaching consultancy, offering personal and professional coaching in person, over the telephone and by videoconferencing. I will be working primarily with those in the tech sector, in startups, in zones 1-3 of London.

### (GOAL 1) OBJECTIVE 1

Improve my communication skills

Action	How will you measure your learning?	Start date and end date
Attend 1 day course <i>Effective communication skills</i> . From this course, I will learn how to improve 'X' and 'Z'. This has been booked, is paid for and time out of the office has been arranged.	I will present an event on 'Y' to colleagues and obtain verbal feedback on whether my presentation skills have developed.	Course on 10 October 2017 and action completed by November 2017

Specific course

Identified the learning outcomes

Includes line manager approval

Will measure learning gained

Start and end date included



## **Planning your development**

1. Read the PDP example provided.
2. Think where you will be professionally in 2 years.
3. Draft a Goal, Objective and at least 2 Actions.

Your Actions must be SMART.

# Resources

Find out more:  
membership@rtpi.org.uk  
+44(0)20 7929 9462  
[www.rtpi.org.uk/apc](http://www.rtpi.org.uk/apc)  
[www.rtpi.org.uk/associate](http://www.rtpi.org.uk/associate)

Podcasts

Online modules

Advice notes

Mentors

Document Title	Target Audience	Published	Applicable From
ASSESSMENT OF PROFESSIONAL COMPETENCE (APC) GUIDANCE	Licentiate guide to RTPI Chartered members	Published March 2015	Applicable from APC submission deadline 5 November 2015
EXPERIENCED PRACTITIONER ASSESSMENT OF PROFESSIONAL COMPETENCE (EP-APC) GUIDANCE	Experienced Practitioner guide to RTPI Chartered membership	Published June 2016	Applicable from January 2017
ASSOCIATE ASSESSMENT OF PROFESSIONAL COMPETENCE (A-APC) GUIDANCE	Associate guide to RTPI Chartered membership	Published June 2016	Applicable from January 2017
ASSOCIATE MEMBERSHIP GUIDANCE		Published June 2016	Applicable from January 2017





## Mentors

A mentor can help you chart your progress and to think reflectively. Meet to review your case studies and PDP.

- Confidential relationship.
- A critical friend – reflective learning.
- Encouragement and support.
- A sounding board.
- A confidant.
- A source of knowledge.
- A mentor is not compulsory, but strongly recommended.



## Presenting the application

This is a professional qualification and the Institute expects the submission to be completed to a high professional standard.

- Paragraph and page numbers.
- Word count: 5,500 (L-APC), 6,750 (EP-APC A-APC), 4,000 (Associate)
- Care and attention to grammar and spelling.
- Clear referencing and footnotes.



## Assessment Outcomes

After assessment you will be sent your results and feedback report.

Three outcomes:

- Successful in all elements, elected to Chartered
- Successful with referral to PDP Support, elected to Chartered
- Unsuccessful, invited to resubmit

Assessors provide feedback in all cases.

**Quality  
Assurance**



# Quality assurance

- Annual face-to-face training of assessors.
- Mid-year 'refresher' training.
- Assessor Handbook at [www.rtpi.org.uk/assessors](http://www.rtpi.org.uk/assessors).
- Random sample of applications audited each year.
- Membership Assessment Advisory Panel (MAAP) oversees process.
- Avenue for appeal.
- Any feedback? Email us at [membership@rtpi.org.uk](mailto:membership@rtpi.org.uk)

