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## Board of Trustees

# Corporate Strategy engagement timetable 2021

## Report from the Chief Executive

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### FOR INFORMATION

The Board of Trustees is asked to note the timetable for engagement in Section 3 and invited to make comments to the Chief Executive.

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## 1. Summary

Following the launch of the Corporate Strategy in January 2020, and subsequent agreement CSIP restricted funds for 2020 and 2021, this paper sets out a high level timetable for engagement on continued implementation of the Corporate Strategy during 2021 and beyond. It proposes the approach for engagement across the nations, regions, standing committees during 2021 to receive feedback on corporate strategy delivery to date, and to discuss potential priorities for 2022 projects.

## 2. Background

This section sets out a reminder of priorities projects to date. There are 58 individual projects that have been identified for delivery in the Corporate Strategy. Six were brought forward for funding and delivery in 2020, and recently the BOT agreed to fund a further six projects during 2021.

### 2.1. 2020 projects

#### 2.1.1. P2-1 INVEST and PROSPER

This project prepared a new business case INVEST and PROSPER targeted at the autumn 2020 Comprehensive Spending review, with a UK treasury proof outline Business Case investing in planning.

#### 2.1.2. P1-8 NURTURE

This project aims to develop and launch a new pilot mentoring programme, NURTURE, aimed specifically at mid-career members who would benefit from support and a boost to help them to step up to middle or senior management. It will be formally launched in February 2021.

#### 2.1.3. CA9 Climate Action Plan

This project saw the launch of the RTPI's first corporate climate action plan in September 2020.

#### **2.1.4. PLANNING IS GREAT**

This project will support the #PTWWN campaign, the idea of a campaign showcasing UK planning as a significant professional services global export also featured in the President's manifesto commitments from the 2019 election campaign. This work will be developed in 2021.

#### **2.1.5. P1-16 GROWPLAN**

This project saw the launch of GROWPLAN, a new growth strategy for the RTPI, and work in 2021 will include conversion campaigns, marketing of routes to membership, ensuring employers understand the benefits of membership, and campaigns to ensure that graduates value and maintain their free student membership as they move into employment.

#### **2.1.6. P4-1 CHANGE**

This project has seen the development and launch of the RTPI's first ever Equalities, Diversity and Inclusivity action plan – CHANGE. Following a short delay (pandemic related) to the recruitment of an EDI Manager to take forward this important work, project delivery is therefore anticipated to ramp up in 2021.

### **2.2. 2021 projects**

These projects were agreed at the December 2020 BOT meeting and a summary is included here.

#### **2.2.1. F7 Rollout Volunteering Strategy**

Dedicated resource by way of seed funding to lead the early delivery of some of the projects and also a small budget for elements of the projects. The project will run for two years, after which the project would be evaluated to ascertain whether it can be blended into existing roles or requires a permanent resource going forward.

#### **2.2.2. P1-10 Expand Chief Planning Officers of Tomorrow**

Dedicated resource to ramp up coordination of CPOT activity, the project will run for two years after which time it will be evaluated to ascertain whether it can be blended into existing roles or requires a permanent resource going forward.

#### **2.2.3. P3-1 Promote public understanding of planning through launch of YOURPLAN**

This will see the development of a targeted public communications campaign, which promotes planning at the heart of a sustainable green economic recovery.

#### **2.2.4. P4-2 Work Experience Pilot**

This project will target to less privileged backgrounds to introduce a pathway to a career in planning.

#### **2.2.5. P4-5 Education For Everyone review**

This project will appoint independent expertise to ensure our pathway into and through education supports CHANGE.

#### **2.2.6. P4-8 Balance**

This project, Build a Legacy and New Community Equality, will seek to establish new priority target locations and establishments for our careers outreach work.

## **2.3. BAU projects underway**

In addition to the projects that have secured restricted funding in 2020 and 2021, there are a series of other BAU projects that have been incorporated into the work of the RTPI.

### **2.3.1. P2-3 Create a strong HEADS OF PLANNING EVERYWHERE (HOPE) network and host an annual HOPE event**

This corporate strategy notes the RTPI will be the leading advocate for campaigning for well-resourced, effective planning functions that support the outcomes local communities was to see. The RTPI is utilising its powerful convening role to bring together chief planning officers from across the nations into a single network of authorities with a new annual event to share best practice and discuss current issues and opportunities. The inaugural meeting on the new HOPE network was held on Monday 30 June as part of the annual The Planner Live Online event.

HOPE is a new annual gathering of chief planning officers from across England, Northern Ireland, Ireland, Scotland and Wales organised by the RTPI with the aim of sharing best practice, making the case for resourcing planning and the important role of putting planning at the heart of local government delivery for the quality places that people want to live in. The first event was held in the margins of The Planner Live in 2020 and a recording on the RTPI's YouTube channel has seen several hundred views since. This has provided a valuable opportunity for planners to share insights into the life of chief planning officers during the global pandemic.

### **2.3.2. P2-4 Launch a new POLITICIANS IN PLANNING NETWORK (PIPN) and host an annual PIPN event**

The aim of launching a new PIPN (replacing the previously disbanded politicians in planning association) is to foster shared practice and interface between politicians and practitioners. It is hoped that through the network the RTPI can deliver a comprehensive engagement and education programme for politicians to help improved shared understanding and the role of good planning.

Whilst there is much appetite for a network, with elected members from across the political spectrum having been directly in contact with the chief executive to offer their time, in the light of the global pandemic it was felt that 2020 might not be the best year to launch, given the extraordinary challenges facing local, regional and national government politicians. Further, the demands of the pandemic have put a strain on RTPI capacity to deliver more within the business as usual envelope, so this project has been postponed until 2021.

### **2.3.3. P1-11 Host an Annual Welcome Event for new members**

Within the value of membership pillar, a key consideration of the corporate strategy is how to better support member engagement through focussing on the value of membership and professionalism, so that planners are not only proud of what they do, but are proud to be a chartered member of the RTPI.

The strategy commits the RTPI to hosting an annual welcome event for chartered members elected to membership during the year in a ceremony that recognises and celebrates their achievement of becoming chartered.

Through the consultation for the corporate strategy there was some anecdotal evidence for members' appetite for an annual 'certificate ceremony' so that newly elected members have the opportunity to celebrate their achievement. In the light of the global pandemic it was felt that 2020 might not be the best year to launch, particularly given the various Governments social distancing restrictions. Further,

the demands of the pandemic have put a strain on RTPI capacity to deliver more within the business as usual enveloped, so this project has been postponed until late 2021 / early 2022.

#### **2.3.4. P1-2 Develop an RTPI events strategy and roll out RTPI must-go-to events and training**

Within the value of membership pillar, a further consideration of the corporate strategy is how to best support life-long education and skills development through opportunities for our members. The strategy commits the RTPI to delivering RTPI-branded events, such as conferences and training programmes that are recognised as the 'must go to' planning events that are technically robust, intellectually stretching and consistently of high quality. The strategy also commits the RTP to deliver content to support different learning styles and geographies by utilising digital platforms, volunteer networks and third-party suppliers.

The success factor will for all RTPI –branded events to be valued by members, with the annual flagship event seen as the premier must-go-to global planning event for all planners.

All of this is being taken forward by a new RTPI events strategy that will see coordination and collaboration across the nations and regions with the end goal being one-programme and efficiencies via minimised duplication, and ultimately a knock-out programme for our members and non-members. The global pandemic has provided the opportunity to fast-track this ambition as virtual events know no geographical boundaries and a new branded RTPI on-line events offer is being rolled out successfully across the nations and regions. The PlannerLive as rebranded and repackaged from a two day in-person conference to a week-long PlannerLiveOnline, our most successful conference in a decade. The formula was rolled out to PlannerLiveOnline Wales and PlannerLiveOnline Scotland.

#### **2.3.5. P1-3 Promote Planning Theory and Practice journal**

Within the value of membership pillar and how to best support life-long education and skills development through opportunities for our members, the strategy states that all planners need to have access to high quality education, skills, knowledge and resources to equip them for today and tomorrow's planning requirements.

The strategy commits the RTPI to promoting our leading Planning Theory and Practice Journal as an important vehicle to serve the need to improve members' critical thinking, supporting the RTPI's role as a learned society. Also within pillar three raising the profile of planning the corporate strategy commits to promote our pleading journal as an important vehicle for promoting the RTPI's unique position as a learned society to provide a platform for articles and research.

The success factor will see RTPI members with relevant knowledge and confidence to work across sectors and address planning challenges whether they be local, regional, national or global. The strategy also notes that a comprehensive suite of learning is delivered through different projects, such as the journal, and is accessible to all members.

In 2020 the journal reached its 21<sup>st</sup> anniversary and the RTPI marked this important anniversary via a special celebration at the RTPI's annual research awards in September. The founder of the Journal, Professor Patsy Healy, spoke alongside the current editor Heather Campbell, and President Sue Manns at the event in early September.

The policy and research service plan will mainstream the promotion of the journal into 2021 business as usual deliverables and priorities. Its dissemination will be considered as part of a wide ranging plan

for the dissemination of planning research in general being developed as part of the new research strategy 2022-24

### **2.3.6. P4-3 Work with national governments and education providers to develop apprenticeships**

Within pillar four, equality, diversity and inclusivity, the corporate strategy notes that we will work with members to continue to promote a diverse and inclusive profession. We want to demonstrate that a career in planning is open for all to join. The establishment of town planning apprenticeships has provided an opportunity to provide new routes into the planning profession from a broader range of talent. Because of the funding arrangements in place with the UK government, within England, the uptake of apprenticeships has exceeded forecasts to date.

The strategy commits the RTPI to work with national governments and education providers to develop apprenticeship schemes across the UK and Ireland, so that we can grow the opportunity afforded by apprenticeships beyond England. Success will see a growth of apprenticeships across the nations, enabling a more diverse pool of talent to have access to a career in town planning.

During 2021 the national directors will continue to work with the devolved administrations to make the case for funded apprenticeships beyond England.

## **3. Engagement approach and timetable**

### **3.1. The approach**

It is proposed that the Chief Executive and the Director of English Regions meet with the Chair of each Regional Management Board and each National Executive Committee, and each Chair of the Standing Committees, during the half of 2021 to discuss corporate strategy. The opportunity will be taken to also discuss 'one institute'.

The purpose of the corporate strategy item will be to take stock on progress to date, receive feedback on what could be improved and have a focussed discussion on the remaining priorities for the final eight years of the corporate strategy with an understanding of any preference for future priorities, subject to funding being available and agreed by the BOT.

The purpose of the 'one institute' discussion will be to explore opportunities for improved coordination and collaboration across the institute across a variety of operations and projects. This is the subject of a separate paper to BOT, and not referenced further in this paper.

It is proposed to combine both into a single meeting for experience and efficiency. A blended approach to the meetings will be taken according to diary availability and preference of the respective Chairs. For example, during 2020 individual meetings were held with Chairs and Honorary Treasurers, but should it be possible to meet with the whole committee or board that can equally be accommodated.

### **3.2. Timetable**

During 2021 there will be extensive engagement throughout the RTPI to ensure all parties are cited, on board and have sufficient opportunity to input into the prioritisation of future corporate strategy projects as well as provide feedback on progress to date.

- 7 January Chair of Committees meeting: strategic discussion on overall approach

- 3 February BOT meeting: strategic discussion on engagement timetable
- 10 Feb SET awayday: strategic discussion on potential 2022 priorities
- 24 Feb Heads of Service strategic discussion on potential 2022 priorities
- Update to Finance Committee on approach and timetable for 2022 CSIP bids: 10 March
- 16 March Nations and Regions Panel
- March / April / May: meetings with regions
  - Yorkshire 13 April (RMB & RAC)
  - North West 20 April (RMB only)
  - East Midlands 21 April (RMB & RAC)
  - London 21 April (RAB only)
  - South West 23 April (RMB & RAC)
  - North West 27 April (RAC only)
  - West Midlands 5 May (RMB & RAC)
  - North East 10 May (RMB & RAC)
  - South East 10 May (RMB & RAC)
  - East of England 10 May (RMB & RAC)
  - London 26 May (RAC only)
  - Young Planners Chairs 6 August (or if earlier, bespoke meeting to be arranged)
- March / April / May: meetings with nations
  - RTPi Scotland 4 May
  - RTPi Ireland 11 May
  - RTPi Cymru 2 June
  - RTPi NI 10 June
- March / April / May: meetings with standing committees
  - ELLC 9 March
  - International Committee 18 March
  - PPRC 24 March
  - M&E 30 March
- April tbc Quarterly catch-up with Committee Chairs

- May tbc SET awayday
- 9 June conversation with General Assembly
- 22 June second conversation with Nations and Regions Panel
- 7 July BOT awayday strategic discussion
- September tbc SET awayday / budget meeting
- 20 October Finance Committee
- September / October tbc Quarterly catch-up with Committee Chairs
- 1 December BOT meeting
- December tbc quarterly catch-up with Committee Chairs

### 3.3. Next steps

The BOT is asked to note the timetable for engagement and invited to make comments to the Chief Executive.

## 4. Health and Safety Implications

There are no direct identified Health and Safety implications over and above those associated with usual business operations and service delivery requirements.

## 5. Equality and Diversity Implications

The Corporate Strategy provides the RTPI with an excellent opportunity to strongly support the RTPI's continued commitment to equality and diversity, and promote a wider engagement on planning matters with the wider public. It sets an ambitious direction of travel for delivering an equality, diversity and inclusivity action plan.

One of the four pillars is dedicated entirely to Equality Diversity and Inclusivity, and all Services Plans in 2021 have been asked to include making a contribution to delivering CHANGE as part of their work programmes.

## 6. Resource Implications

Following establishment of a Finance Committee in February 2020, a dedicated restricted fund was proposed and agreed for CSIP during 2020, and again for 2021. The detailed scrutiny of future business cases and delivery will be undertaken by the finance committee, with regular high-level reports, such as this paper, brought to the BOT at appropriate intervals.

There are no legal requirements for the RTPI to deliver a Corporate Strategy but it is expected as best practice, by the Charity Commission, to prepare a clear statement of intent, purpose with clear objectives to enable sound financial and operational management of the organisation.

This dedication of restricted funding for the corporate strategy is fully in accordance with the RTPI's recently updated Reserves Policy.



## **7. Governance and Compliance Implications**

There are no legal requirements for the RTPI to deliver a Corporate Strategy but it is expected as best practice, by the Charity Commissioner, to prepare a clear statement of intent, purpose with clear objectives to enable sound financial and operational management of the organisation.

The 2020-2030 Corporate Strategy provides a clear framework of focussed objectives for the whole of the RTPI, regardless of geographical boundaries. It sets an ambitious direction of travel for a one-institute, one-profession approach to future growth of the profession.

Support from the Nations and Regions in delivering the corporate strategy is crucial. There are at least 30 of the 58 corporate strategy projects dependent on support from the nations and / or regions.

The nations and regions will be extensively engaged through the timetable set out in this paper to ensure they can play an active role in delivery of the corporate strategy through their existing and future business plans.

## **8. Communications Implications**

Since the launch of the Corporate Strategy, all subsequent launches of projects have been presented as supporting delivering on the corporate strategy. This commenced with the launch of the Equalities Inclusivity and Diversity Action Plan CHANGE in February and the launch of the RTPI's new Website in March, both of which referred to delivery of the corporate strategy. In addition, the launch of the invitation to tender for preparation of the RTPI's corporate action plan, NURTURE, and INVEST & PROSPER all made clear their role in supporting delivery of the Corporate Strategy.

This continued branding and messaging supports maintaining profile and impact of the value proposition to Members, and a compelling narrative to stakeholders and interested parties. A continual pipeline of activity is helping to support the proposition that the corporate strategy is a living document focussed on addressing the issues that matter for members and providing the services they value.

## **9. Corporate Strategy - Climate action**

All engagement will be undertaken on a 'digital first' principle to minimise travel associated with this comprehensive engagement programme.

## **10. Corporate Strategy - GROWPLAN**

Given the ongoing global pandemic and the need to maintain the RTPI's offer provided to members, progress with delivering the corporate strategy remains a major priority for the RTPI and is an integral part of the value proposition within GROWPLAN.

## **11. Corporate Strategy - Digital Transformation**

As per section 9.