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RTPI
Royal Town Planning Institute

General Assembly

# PROJECT ONE INSTITUTE

Report from the Director of Scotland, Ireland and English Regions

**FOR DISCUSSION AND COMMENT**

Members of the General Assembly are asked to provide views on the questions posed in paragraph 20 of this paper.

## 1. Context – Project One Institute

1. At the most recent meeting of the Board of Trustees it was agreed to gather views on what was needed to support a "One Institute" approach across the Institute. The "One Institute" approach has never be defined in any detail however it is considered that it comprises the following:

- Corporate consistency working towards a common goal across the Institute in terms of brand, offer and quality of service
- Developing services and products to meet members' needs and circumstances, building on strengths of nations and regions
- Embedding early engagement, collaboration and co-design across all relevant parts of the Institute in the development of new products and services
- Ensuring that there is regular, constructive and ongoing dialogue between corporate services and the nations and regions

2. This approach will be essential to ensure the successful delivery of the Corporate Strategy. A restructuring of the Senior Executive Team and new service planning arrangements have been put in place to support this. In taking this forward it is considered that there is a need to agree how best to optimise the relationship between corporate functions and the RTPI's nations and regions so as to maximise their contribution to delivering the Corporate Strategy.

3. The nations and regions are an important asset to the Institute. They are named as a Foundation in the Corporate Strategy:

> "The RTPI's Nations and Regions will play a crucial role in the delivery of the corporate strategy. In promoting the RTPI's ambitions, in building productive and fruitful relationships with governments, politicians, stakeholders and members. They will sit at the heart of realising the vision and mission."

4. We believe that this project presents an opportunity to allow the regions become a stronger part of the Institute.

# 2. Rationale

## 2.1. A Changed Context

5. We have witnessed significant changes in the political, economic and legal context for the Institute's operations, including:

- devolution of policy and powers from the UK to government to devolved nations and English regions and the nations have their own legislative powers on various areas, including planning
- increased competition for members and services from other organisations
- a more crowded environment at a time when we want to strengthen our influence and voice
- an increasing need for members to keep up to date with changing policy, practice and technology
- technological change impacting on the way services can be delivered and increased expectations of how this should be done
- tight financial and resourcing circumstances

6. Over the last few years the roles, management and governance of the RTPI nations have changed considerably to ensure that they are positioned to meet the Institute's objectives in this context. This has included:

- establishment of National Executive Committees in each nation with responsibility for policy and public affairs in their country
- appointment of national directors, now covering all 4 nations
- enhanced representation in the SET through national directors
- offices in Edinburgh and Cardiff
- establishment of Chapters to support local CPD provision in Scotland and Wales

7. It is considered that these changes have enhanced communication, engagement and alignment between the nations and RTPI corporate functions, and vice versa. This has made sure that they are in a good position to contribute to, and support the delivery of, the Corporate Strategy.

8. However, despite a changing operating context over that period, our English Regions have remained largely unchanged. Given this it is considered that there is a need to explore what an optimum operating model could look like. This paper therefore concentrates on the governance, roles and shape of the English regions, although the interaction between RTPI nations and corporate services is also being considered.

## 2.2. A Corporate Approach

9. The Corporate Strategy says

> "With only 75% of domestic planners professionally qualified, there is an opportunity to broaden professionalism in the UK. This is underpinned by taking a one profession, one institute approach blending corporate consistency with local delivery. We want all planners to have pride in their profession and value professional membership, regardless of where they live."

10. The Institute's activities need to be joined up, complementary and support the ambitions of the Corporate Strategy. All parts of the Institute should be on the same page, working towards a common goal. This relies upon a consistent corporate offer that takes account of local needs, circumstances and strengths and embedding two-way, early conversations between the nations and regions and corporate functions. Any way forward will need to complement the aims and objectives of RTPI strategies including GROWPLAN, the Climate Action Plan, the Volunteering Strategy and CHANGE – the Equality, Diversity and Inclusivity Action Plan.

11. It is fair to say that communications between corporate functions and the regions, and vice versa, are not always perfect. There can be disconnects between regions and centrally delivered functions, with some regional staff and volunteers not always aware of who is responsible for what in terms of RTPI functions and services, whilst some corporate staff are not always fully aware of the context of, or opportunities of work with, the nations and regions.

12. The nations and regions can sometimes feel that they are not seen as a corporate priority or that they are not engaged in decision making on corporate priorities. This can mean that corporate priorities are not always seen as important or understood at local level which can lead to local positions being at odds with corporate approaches. It can also result in nations and regions involvement in delivery of corporate projects needing to be retro-fitted.

13. There are examples of more collaborative engagement recently such as the early engagement and roadshows put in place to discuss the Corporate Strategy and its delivery plan.

## 2.3 The New Normal

14. It is considered that we need to adapt and make the most of opportunities arising from the 'new normal'. The Institute has reconfigured much of its work in response to COVID-19 including moving all of its meetings online, bringing in a virtual events programme and supporting staff to work remotely. Many of these changes will remain in place once the pandemic is under control.

15. Committee and management board meetings can now be easier to attend and will rely less on people having to travel to attend in person. The Institute's webinars and video recordings can now be made available across the membership, wherever they are located, though this means that there needs to be a coordination of the events programme to minimise duplication and to ensure consistency of offer.

## 2.4 Strengths of the Nations and Regions

16. The nations and regions have a number of key strengths that are not always built upon:

- having a strong link to members, members' employers and local stakeholders
- being the shopfront and often first point of contact for members
- being in a position to gather intelligence from local stakeholders and members
- ability to react and respond to local circumstances and opportunities
- having engaged and committed local volunteers delivering at the local level
- having engaged and committed local staff working at the local level
- acting as a gateway to the Institute's work for members, potential members, stakeholders and partners
- being the contact, relationship and gateway for young planners to engage with the Institute
- ability to promote the RTPI and its work locally

- a recruitment channel for volunteers for all parts of the RTPI

17. However, it is considered that the Institute has not always made the most of the relationship management role that the regions can play. It is considered that there are opportunities to:

- increase the strength of stakeholder relationship at a local level
- benefit from currently untapped knowledge and skills within volunteers and staff in the nations and regions
- deliver corporate services that meet local needs and circumstances
- contact potential members and their employers which can help grow membership
- tap into members and potential volunteers who are yet to engage with the Institute
- develop local coordinated account management and sponsorship generation
- roll out of consistent corporate messages across the regions
- roll out a programme of consistent services across the regions

18. This points to exploring the role of the regions in membership engagement and growth, customer relations, policy development, public affairs and research and asking if the 'shape' and governance of the nations and regions is right to ensure that they are more embedded in the delivery of the corporate strategy; how best to make resources for the regions have; and how we manage, monitor and deliver through the service planning process.

## 3. Discussion

19. It was agreed at the most recent meeting of the Board of Trustees that an engagement exercise be undertaken involving the General Assembly, Nations and Regions Panel, each National Executive Committee and Regional Management Board, the Senior Executive Team and Heads of Service to gather views on what was needed to support a One Institute approach. This comprises a three phase engagement programme that is set out below.

### Phase 1

20. Phase 1 involves discussion with the Board of Trustees, Nations and Regions Panel, each National Executive Committee and Regional Management Board, SET and Heads of Service to gather views on the possible changes that can be made to support a One Institute approach. Given this we would like each Committee/ Panel/ Management Board to consider the following questions:

***Engagement***

- How do we ensure we have a consistent corporate offer that takes account of local needs, circumstances and strengths?
- How do we embed two-way, early conversations between nations/ regions and corporate functions?

***Roles and Responsibilities***

- Can we build on the key strengths of the regions and nations so that they have a stronger role in membership engagement and growth, customer relations?
- Can and should there be a stronger role in the English Regions in policy development, public affairs and research?
- Are there any functions that nations and regions should stop or give less priority to?

***Governance and Management***

- Is the 'shape' and governance of the nations and regions right if we are to ensure that they are more embedded in the delivery of the corporate strategy? If not, what should change?

21. We will also offer opportunities for more in-depth discussion where regions and nations feel this would be useful through, for example, separate discussion outside of the Management Board/ National Executive discussions, meetings with Chairs or groups of chairs, focus groups, or through nations discussing with their respective Director. We are open to ideas on this.

22. Phase 1 will also include scoping and analysis of other bodies to see if there are lessons to be learned that can be fed into the project.

### Phase 2

23. These discussions will inform phase 2 of the project which will look to develop proposals on engagement, responsibilities and governance. These will be 'tested' with Regional Management Boards and National Executive Committees, the Nations and Regions Panel before being brought back to the Board of Trustees in December 2021.

### Phase 3

24. This will involve developing a delivery plan based on agreed approaches and implementing this. It is hoped that any new arrangements can be put into place by the end of 2022.

## 4. Project Management

25. The project is led by the Director for Scotland, Ireland and English Regions with support from the Director of Wales, Northern Ireland and Planning Aid England; and the Head of the English Regions.

26. Key stakeholders in the project are:

- The Board of Trustees, especially the Chair, the Nations and Regions Representative and the Scotland Representative.
- Regional Management Boards
- National Executive Committees
- Standing Committees
- Nations and Regions Panel
- General Assembly
- Staff in the nations and regions.
- The Senior Executive Team and Heads of Service
- RTPI Governance team

## 5. Health and Safety Implications

*None*

## 6. Equality and Diversity Implications

*A key aim of this project is to support the delivery of the RTPI Equality, Diversity and Inclusivity Strategy, especially by increasing the diversity of members and volunteers involved in the Institute's work.*

## 7. Resource Implications

*The project will be delivered within existing resources.*

## 8. Governance and Compliance Implications

*The project will involve all jurisdictions. The outcomes of the project may have implications on governance, byelaws, regulations and devolution.*

## 9. Communications Implications

*This will be a sensitive project where communications will be handled carefully.*

## 10. Corporate Strategy - Climate action

*The outcome of this project will help support the Climate Action Plan.*

## 11. Corporate Strategy - GROWPLAN

*The outcome of this project will help support the delivery of GROWPLAN.*

## 12. Corporate Strategy - Digital Transformation

*To be confirmed. Consideration will need to be given on how digital transformation can support the One Institute approach.*