



RTPI

Royal Town Planning Institute

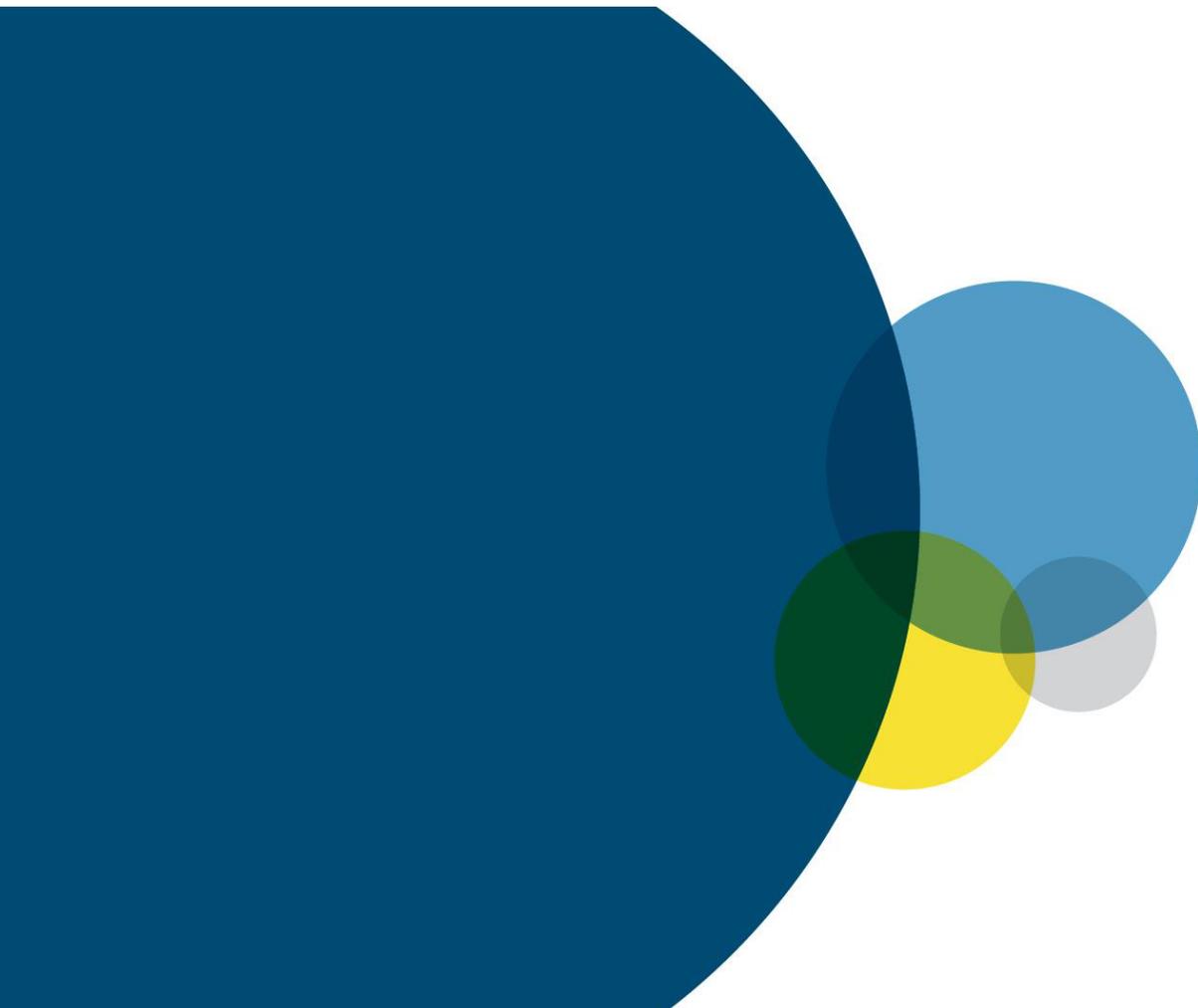
THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT AND ACCOUNTS

31 DECEMBER 2020

Registered Charity No: 262865

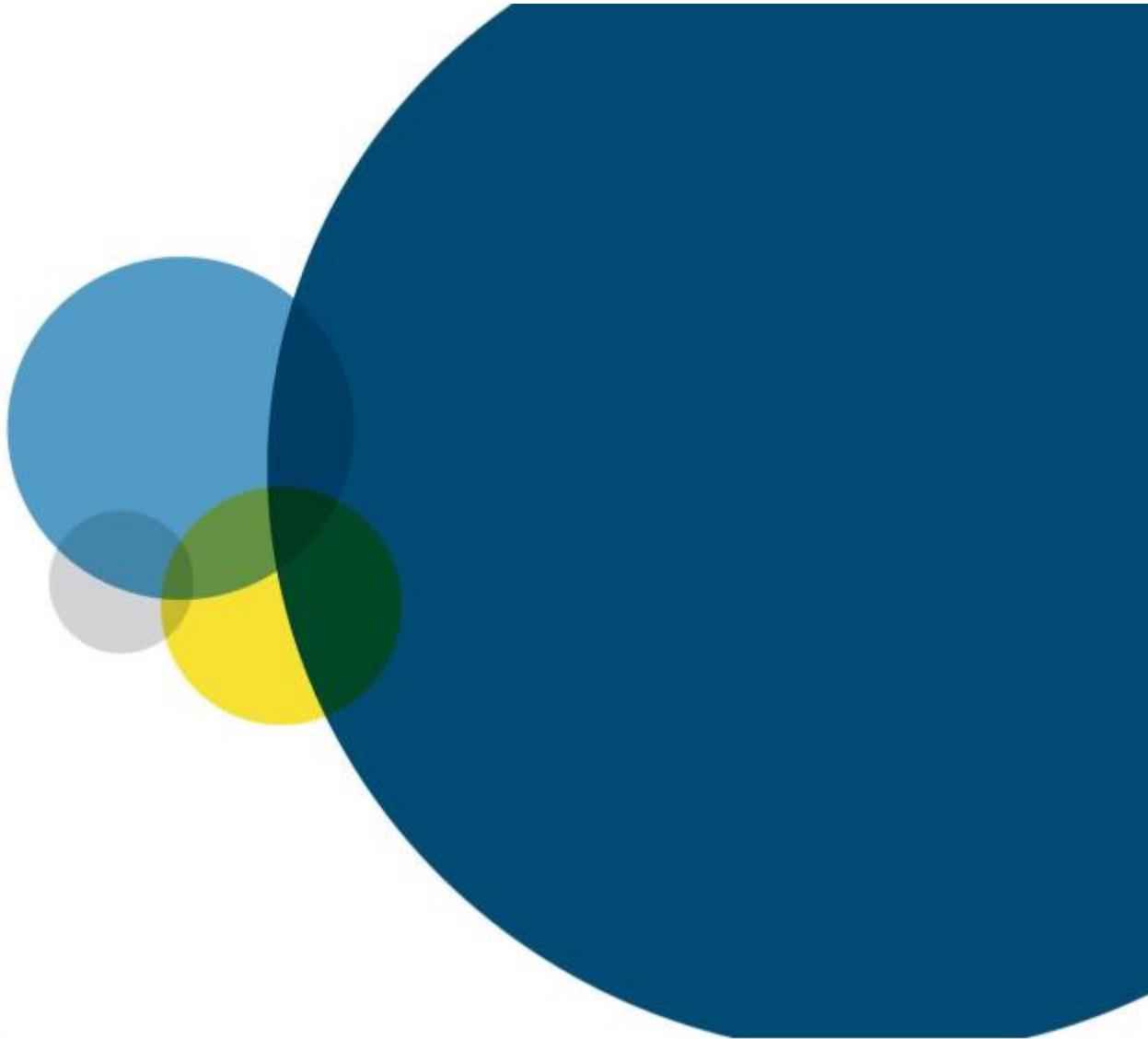
Registered Charity in Scotland No: SC037841



THE ROYAL TOWN PLANNING INSTITUTE

INDEX

Page	Contents
1	Index
2 - 35	Annual Report of the Trustees
36 - 38	Independent Auditor's Report
39	Consolidated Statement of Financial Activities
40	Charity Statement of Financial Activities
41	Charity and Consolidated Balance Sheets
42	Charity and Consolidated Cash Flow Statement
43 - 63	Notes to the Financial Statements



THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020

The Trustees of the Royal Town Planning Institute (“The Institute”) are pleased to present their Report and Financial Statements for the Institute for the year ended 31 December 2020. The Trustees confirm that the Report and Financial Statements of the Institute comply with the current statutory requirements of the Institute’s governing document and the provisions of the Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard in the UK and Republic of Ireland (FRS 102) (second edition effective 1 January 2019), the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Charities and Trustee Investment (Scotland) Act 2005, and applicable accounting standards.

Foreword to the Royal Town Planning Institute Annual Review 2020

Chair of the Board of Trustees, Susan Bridge FRTPI

2020 was an exceptionally difficult and challenging year for the country and for our members. I am extremely proud of the excellent work that the Board of Trustees, General Assembly, Nation’s, Scottish Chapters, the English Regions’ boards and committees, our standing committees, volunteers, the RTPI leadership team and the RTPI officers achieved during the coronavirus (COVID-19) pandemic.

By anticipating the extreme situation that caused the UK, Ireland and countries internationally to place their populations under restrictions of movement to contain the spread of the disease, the RTPI was able to purchase enough laptops and other technology in advance of the UK lockdown on 23 March 2020 to enable officers to work from home immediately. The RTPI transitioned to an entirely digital operation, almost overnight to continue to support, defend and promote our members’ interests, with no break in service. This was in large part due to the investment that the Board of Trustees made in our IT infrastructure over the last few years which, allowed the Institute to move almost seamlessly to online meetings, events and member communications. Whilst we, like all other organisations, suffered financially because of the unforeseen last-minute cancellations and other changes, the RTPI proved to be a very resilient organisation as these accounts show. This resilience has also enabled us to offer our members outstanding support and to continue to deliver our corporate strategic goals during a very testing year.

From March 2020 it was vital that our priority was to provide support for our members, whilst delivering the Corporate Strategic Objectives agreed through the Corporate Strategy 2020-2030 adopted by the Board of Trustees in 2019. The RTPI supported its members in so many ways including through a wide variety of excellent online events that were free throughout the year. This online events offer went a long way to ensuring that our members received information on the ever-changing requirements from governments on lockdown measures and on best practice, as well as enabling members to continue with their professional development.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Foreword to the Royal Town Planning Institute Annual Review 2020 (continued)

The RTPI Trust was able to support members facing financial difficulties and the RTPI Trust was promoted with renewed vigour in 2020. Whilst we could not see each other face-to-face, certain events like our Planner Live conferences and Young Planners conference enabled members from across the UK, Ireland and further afield to interact and to hear from thought leaders in planning and the built environment.

We also launched our **#PlantheWorldWeNeed** campaign, under the Corporate Strategy pillar of “Raising the Profile of Planning”. This has been hugely successful in putting the planning profession at the centre of the debate on how our nations can recover from the pandemic in a greener, healthier and more economically equitable way. We were delighted that the campaign was referenced in the England planning white paper consultation launched by the Ministry of Housing, Communities and Local Government in August 2020.

As planners we have always prided ourselves on being able to respond quickly to societal changes. The pandemic has shown our profession to be adaptable, progressive and hardworking. The pandemic also highlighted many of the agendas we have been talking about for years; the need for healthy places that mitigate climate change whilst supporting economic growth and development.

The planning system and profession were created out of the need to address the public health consequences of the industrial revolution. Now in response to a global public health emergency we have shown how essential and relevant planning still is and will continue to be. I think that we can approach our work with a renewed sense of confidence. Whilst governments may want to reform or re-evaluate our planning systems, we have demonstrated that wider society and governments cannot do without us and that they value our opinions, thanks in no small measure to the work of the Institute in 2020. I am delighted to say that in 2020 planners also saw more than ever the value of belonging to the Royal Town Planning Institute as we ended the year with achieving a membership of **26,000** for the first time.

The world has changed radically in the past year, and as preparations are made to recover from the pandemic during 2021, the RTPI is poised to capitalise on the positives of the changes forced on us in 2020 and to re-focus again on what is important for our members.

Susan Bridge FRTPI, Chair of the Board of Trustees

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020

(continued)

Reference and administrative details

The Royal Town Planning Institute (RTPI) is a charity, registered in England and Wales (Charity number: 262865). The RTPI is also registered in Scotland (Charity number: SC037841).

The principal and registered office of the Institute is 41 Botolph Lane, London EC3R 8DL.

Trustees (from 1 January 2020 – 31 December 2020)

President 2020:	Sue Manns
Vice President 2020:	Wei Yang
Immediate Past President 2020:	Ian Tant
Chair of the Board:	Susan Bridge
Honorary Treasurer:	Andrew Taylor
Honorary Solicitor and Secretary:	Bernadette Hillman
Trustee for Young Planners:	Laura Archer
Trustee for Scotland:	Stefano Smith
Trustee for Regions and Nations:	Rebecca Dewey
Independent Trustees:	John Powell
	John Fenna
Elected Trustees:	Lucy Seymour-Bowdery
	Tony Crook
	Janet Askew
	Tom Venables
	Meeta Kaur

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Reference and administrative details (continued)

Senior Executive Team (from 1 January 2020 – 31 December 2020):

Chief Executive	Victoria Hills
Director of Commercial & Corporate Services	Richard Patrick
Finance Director	Jacqueline Rees (until October 2020)
Director of Scotland & Ireland	Craig McLaren
Director of Wales & Northern Ireland	Roisin Willmott

Other relevant organisations:

The Institute's bankers are HSBC Bank PLC, City of London Commercial Centre, Level 6, 71 Queen Victoria Street, London, EC4V 4AY.

The Institute's auditor is Haysmacintyre LLP, 10 Queen Street Place, London EC4R 1AG.

The Institute's solicitors are Blandy and Blandy, One Friar Street, Reading, RG1 1DA.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Delivery of the Royal Town Planning Institute's Corporate Strategic Objectives in 2020

Commentary from the Chief Executive, Victoria Hills FICE, MRTPI

We will all look back on 2020 as the year we didn't plan for, but nevertheless it was my privilege to lead the executive team of the Institute in a year of transformation that saw us end the year in a stronger position than when we started.

Despite the difficulties we all faced in 2020 I am delighted that membership grew over the year. Planners around the country are taking the important step in their careers of seeking to achieve Chartered status, the hallmark of professional expertise and integrity. The total number of RTPI members has now reached **26,000** for the first time, including continued growth in the 'pipeline' categories of Student and Affiliate. There has also been an excellent take up of the new Chartered Town Planner Apprenticeship, with over 200 apprentices currently studying at ten universities across England. Encouragingly, 51% are female, 41% are employed in the public sector and 14% have either South Asian, East Asian, Black Caribbean, Black African or mixed heritage. A survey of our apprentices suggest that more than half come from families where neither parent has a degree. The investment we have made into enabling this exciting new route into a career in planning continues to grow and will provide an important opportunity to diversify the entrants into the planning profession.

We started the year launching the Corporate Strategy shortly followed by the Institute's first equality diversity and inclusivity action plan CHANGE. During the year we also launched a number of corporate strategy projects including our digital transformation programme, the high-profile **#PlantheWorldWeNeed** campaign and research report, our first Climate Action Plan, and our Invest and Prosper business case for planning submitted to government.

We strengthened our already robust governance arrangements by progressing the independent recommendations in the 2019 board effectiveness review, implementing many of the recommendations already, including the establishment of a Finance Committee and an Appointments and Remuneration Committee. This ongoing area of work will continue to pay dividends to how our Trustees and members oversee our affairs. I am proud to have sharpened up internal operations through the pandemic by the introduction of GOLD meetings which meant we were able to respond at pace to the pandemic. The Transformation of the RTPI's membership offer to entirely digital offer has enabled the RTPI to demonstrate the continued value of membership which has supported the retention and seen the growth of membership. Creation of new member resources such as the COVID hub, and focussed research on the planners' response to the pandemic alongside our engagement on policy has supported delivery of what members wanted to see from their professional body.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Commentary from the Chief Executive, Victoria Hills FICE, MRTPI (continued)

The external affairs, training and events offering of the Institute has gone from strength to strength as we moved quickly to launch 'RTPI Online' events and moved all our training online, which saw record growth in engagement of our members and non-members. We launched 'The Planner Live' and rolled out the same brand across our regions and devolved nations. We revamped and relaunched our website, with over one million 'hits' which is a new record. Our COVID-19 information hub has supported our members during a period of rapid change to help them stay abreast of changes in planning policy, and our 'snap shot' surveys have informed our approach on policy and practice, external affairs and campaigns. Planning Aid England has continued to provide services to the public and our volunteers responded to almost 2,000 enquiries through our e-mail support service. We met with more politicians during 2020 than any year previously, and our work on national planning policy, not least the Government's White Paper Planning for the Future saw a national engagement strategy across our nine regions to distil our response to the Government. Across the nations we have had continued positive influence for example on digital planning and the National Planning Framework in Scotland and on place making and the National Development Framework in Wales. We have continued to secure media coverage on our priority campaigns across all nations on policy matters, representing our members' views for resourcing of planning and planners, the need for action on climate action and support on embedding design quality to name a few priorities.

We ended 2020 in a position of strength with total funds increasing by £79,000 to £10.7 million. Income from membership and subscription fees increased from £5.0 million to £5.2 million and although overall income decreased due to the pandemic from £7.7 million to £6.6 million, expenditure also decreased from £7.7 million to £6.6 million.

Together in 2021 we will work to cement this success and to continue to deliver for you, our members. I would like to thank our brilliant team of officers at the RTPI, our dedicated volunteers and the Board of Trustees for all their hard work and support. Finally, I would like to thank you, our members, for belonging to this unique and thriving Institute. Your professional home is always here for you and we can look forward to a brighter future together.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Objectives and Activities

The objectives of the Chartered Institute, as incorporated in the Supplemental Charter 2003 and amended in 2012, are to advance the science and art of planning (town and country and spatial planning) for the benefit of the public. The Trustees have referred to the Charity Commission's general guidance on public benefit when reviewing the Institute's aims and objectives and when planning future activities.

Vision

To be the world's leading professional planning body. Our ambition is to promote healthy, socially inclusive, economically and environmentally sustainable places.

Mission

To advance the science and art of planning, working for the long-term common good and wellbeing of current and future generations.

What we do

Our core objectives are:

We influence – Stand up for planning and promote good planning policy and practice.

We are here for our members – Represent, support and promote planners and the profession.

We lead learning – Educate, train and maintain advance professional standards.

2020 saw the start of our new 2020-2030 corporate strategy. The strategy has four priority areas or "pillars" which support our core objectives. The **Four Pillars** are:

- Promoting the value of membership and professionalism
- Supporting planning services
- Raising the profile of planning
- Promoting equality, diversity and inclusivity

Climate Action

Our response to climate action is a holistic one, and therefore actions in response to climate change sits across all pillars of the strategy.

The Foundations

The four pillars are held up by ten foundations: Member Services (Digital Transformation); Nations and Regions; International Strategy; Research and Policy; Brand; Diversifying Sources of Income; Professional Volunteering; Governance; the Right Home for the RTPi; and Business Planning.

Further details on our 2020-30 strategy can be found on our website at: <https://www.rtpi.org.uk/news/our-strategic-priorities/>

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Achievements and performance

Set out below are the achievements and activities in 2020 under each foundation and pillar of the corporate strategy.

Corporate Strategy Foundations:

Member Services:

Assessment of Professional Competency (APC): In 2020, we enhanced our APC webinar series in response to COVID-19. We launched new APC monthly bitesize webinars to sit alongside the existing monthly APC training webinars. We aim to reach as many candidates as possible to support them through the APC process to gaining Chartered membership.

Continual Professional Development (CPD) and events: In the first quarter of 2020 prior to lockdown restrictions, the English Regions held 12 CPD events attended by in excess of 600 delegates.

During the lockdown across the UK from 23 March 2020 the RTPI Senior Executive Team and Board of Trustees agreed to ensure that all online events were held as free of charge to members to support members in keeping in touch with their peers and the Institute, and to support members in maintaining their continuing professional development. Teams from across the institute collaborated to deliver a single RTPI Online Events offer for the whole year, accessible to members across the UK and Ireland. This approach was extremely successful with members who appreciated the “opening up” of events in different areas of the country with the benefit of being able to share best practice from across the UK and Ireland to network, albeit online, with peers from other nations and regions. In all, the RTPI delivered over 130 events online. Most online events were recorded on video, and uploaded for members to view via the RTPI’s YouTube channel.

Regions contributed 90 online CPD events, with in excess of 14,800 delegates registering to attend and subsequent views of these sessions on YouTube reaching a wider audience than ever before. In addition, outputs were created for **RTPI Learn** – the RTPI’s online professional development portal. We commissioned an Index of Climate Tools for use by local authorities across the UK and Ireland. RTPI Learn was also used to provide CPD material on using the Sustainable Development Goals.

The English Regions developed new virtual mechanisms to help members keep in touch, reaching out through social programmes and in the English Regions, dedicated online ‘drop in sessions’ hosted by our Regional Chairs. Members participated in online Bingo, online quizzes, and ‘Room 101’ sessions to name a few providing vital social interaction during a time of potential isolation. Our Young Planners network continued to reach out to members and future members. 14 CPD events were held with a specific focus on Young Planners.

RTPI Scotland events shifted to an online format from April. Over the year 44 events or webinars were organised and were attended by 2,634 people.

RTPI Training delivered its CPD modules through an online platform booked through the website in a new “masterclass” format.

A Practice Advice Note was published on Probity and Planning. As part of our ongoing commitment to equality diversity and inclusion we published an updated note on Dementia and a new one on planning for mental health.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Digital Transformation:

Website:

In early March 2020 the RTPI launched its new website, offering an enhanced member experience including the facility for members to renew their subscriptions online, to log their CPD hours, to be able to book online events easily and ensuring that members could more quickly find the latest information, reports, blogs, events and news. The new website has received in excess of 1 million views during 2020. Within the first month of the pandemic the RTPI created a “COVID Hub” on the website, with information from all governments on emergency planning measures and also best practice case studies from across the UK and Ireland. We also ensured that access to the RTPI Trust was enabled in an easier way for members online, so that any members facing any financial difficulties could apply to the charitable Trust for practical help.

The RTPI’s IT team led on the procurement and management of an upgraded RTPI Learn portal as a ‘single sign-on’ project enabling all members to continue to access the RTPI’s e-learning portal free of charge.

Digital platforms

The RTPI moved to a digital only offer for members during the first weeks of the lockdown due to the pandemic and all events and CPD were held online via various online event platforms. RTPI officers and volunteers were able to meet via Microsoft TEAMS as well as Go To Webinar and Go To Meeting.

Digital communications:

A regular digital **COVID Bulletin** was sent to members on a weekly then monthly basis to ensure all members were supported during the lockdown.

Governance Portal:

Supporting the good governance practices, the Trustees invested in the governance portal to have a secure platform that allows the Trustees to access the Trustees/Committee Meetings papers; governing documents; structures; etc. This new tool enabled more effective remote working for the Trustees during 2020, it is secure and eliminates the added cost that paper book carries.

Recruitment website:

2020 saw the launch of a new recruitment website and applicant tracking system for the RTPI which has transformed candidate experience and streamlined HR processes.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

RTPI Nations and English Regions:

RTPI Nations and English regions delivered chapter, committee and young planners meetings, events, CPD and some social activities through virtual platforms.

International Strategy:

An **International Strategy Working Group** of members from the RTPI standing committees has prepared an International Strategy for adoption in 2021 as a key part of the Corporate Strategy. The RTPI was represented at the World Urban Forum in Abu Dhabi in February 2020 by President Sue Manns and Chief Executive Victoria Hills. The RTPI's work on children's play in cooperation with Lego and IKEA and Arup was showcased and the RTPI representatives met the Executive Director of UN Habitat, with whom the RTPI works to deliver capacity building support for the UK Government.

The West Midlands International Group marked World Town Planning Day with a *'Perspectives from Europe'* event, whilst in Yorkshire their committee hosted *'Learning from Hamburg: lessons for UK planners from one of Europe's most dynamic cities'*. A new international group was established in the South West.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Research and Policy:

The RTPI delivered year 2 of the **Research Work Programme 2019-21** commencing with a report on Climate Justice. The year continued with the first part of the RTPI's work programme on Women and Planning. A number of our reports in 2020 focused on the vital issue of planning over wider areas for infrastructure and climate resilience. The RTPI's report on INVEST & PROSPER has provided valuable background information on the value of planning which can be set against complaints about the cost of planning.

In addition, we led a 4-nation research project into better Measuring Planning Outcomes published at World Town Planning Day, through which we show that there are better ways of evaluating planning than the speed of planning applications. We provided research on the hot topic of housing design to the UK Collaborative Centre for Housing Evidence, as part our long-running contract with them. We used text mining to assess the perceived value of green space during the COVID-19 crisis.

England Policy

More than 100 members from across each region actively contributed to the RTPI's response to the White Paper, providing local insight and intelligence through dedicated Roundtable sessions.

Following signs that the Government wished to embark on changes to the planning system the RTPI published *Priorities for Planning in England* to lay out our stall. We provided the public and also the sector with a guide to zoning systems round the world. Following widespread internal consultation we responded to the Government's planning white paper, indicating areas such as growth areas where we could demonstrate support, and other areas such as so-called renewal areas where the proposals seem insufficiently well worked out

Scotland Policy

RTPI Scotland published research funded by Scottish Government on the Benefits of Investing in a Digital Planning Service. This examined the economic and societal benefits arising from digital transformation and found that the Scottish economy could benefit to the tune of £200 million over 10 years by introducing digital planning services.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Professional Volunteering:

This year has seen the benefits of volunteering promoted more widely, leading to more vacancies being filled with a new and enthusiastic cohort of volunteers. In July 2020, President Sue Manns launched the RTPI's first ever [Volunteer Charter; Investing in Volunteers: Collaboration for a Sustainable Future](#) setting out how the Institute will support and strengthen our volunteer network to help us achieve our common goals.

In England we introduced **regional committee inductions** for new committee members to our Regional Management Boards and Regional Activities Committees, and created an Education champions network.

The RTPI Cymru Executive Committee has met online across the year and adapted well to the new form of meetings, supporting the work of RTPI Cymru. A new RTPI Cymru Policy and Research Forum was formed from the start of 2020. The Forum is a sub-forum of the Executive Committee.

The annual volunteer Partnership & Accreditation Panel was held online to review effectiveness of Planning Schools and commence Corporate Strategy project **Education for Everyone**.

Planning Aid England (PAE) had a total of 244 volunteers in 2020, 151 (62%) of whom are Chartered and we know that many members find volunteering for PAE a rewarding activity. In terms of motivation for volunteering with PAE (from the last biennial survey undertaken in 2019) the most frequently mentioned reason was to use their professional skills and knowledge to help others, followed by: continuing professional development; broadening knowledge of wider planning issues and finally to gain practical experience of planning. We also recruited additional panel members who were trained in February and December (those trained in December joined the panel in early 2021).

In 2020 PAE had to adapt its mode of operation including the e-mail advice service, our dedicated planning advice website, and casework. PAE received over 100,000 hits on its advice and guidance website. A virtual volunteer meeting was held in September with a cross section of our key volunteers attending including representatives from the e-mail and website panels, the task groups, and key casework volunteers. Two online masterclasses on planning and community engagement were delivered, with 12 fully funded places being taken up by PAE volunteers.

The Right home for the RTPI:

The RTPI was able to quickly move to a remote working model for all RTPI colleagues at the start of the COVID-19 pandemic in March 2020. As a result, we are now well equipped to adopt a new, blended approach of office / hub working and home-working. This removes some of the pressures on office space seen before the pandemic. It provides the opportunity to explore a variety of options for a 'right home for the RTPI' that can foster innovation and drive achievement of the corporate strategy objectives including the RTPI's Climate Action goal of achieving net zero carbon emissions by 2025.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Climate Action:

Climate action and promoting the role of the planning profession in enabling development and infrastructure to mitigate climate change runs through the heart of all that the RTPI does.

In September 2020 the RTPI Board of Trustees Climate Action Champion, Ian Tant FRTPI, launched the RTPI's **Climate Action Plan** with the goal of reducing the Institute's carbon emissions to net zero by 2025. In 2019 the Institute's greenhouse gas emissions were 175.6 metric tonnes CO2 equivalent. The pandemic disrupted work on many of the actions identified in the Climate Action Plan. The need to reduce greenhouse gas emissions through reduced travel, office energy costs and printing were largely achieved albeit unintentionally through enforced restriction. The print and distribution of the Planner Magazine was identified as one of the single largest contributors to carbon emissions for the RTPI and from July 2020 was trialled as a "digital only" publication. The reduction due to the pandemic meant emissions were not measured in 2020. Once restrictions are lifted some of the new working practices will support delivering climate actions with renewed traction and emissions to be measured in 2021.

In March the RTPI Cymru Policy and Research Forum received a presentation from Extinction Rebellion to discuss issues that need to be addressed and how planning and the profession can respond.

The RTPI revised its 'Core CPD Framework' guidance for RTPI members to include 'Climate Change & Environmental Planning' as core learning.

Climate action was put at the heart of regional CPD programmes, with a raft of events devised to support members with their knowledge and understanding of key issues, events included: *Climate Emergency – What next for the UK*; *Climate action: Protecting communities from tidal surges (Boston Barrier Flood Protection Scheme)*; *Climate Change and the Ecological Turn in Planning*; *Adapting the Built Environment for Climate Change*; *Planning with Climate and Environmental Change*; *Climate Resilience*. A new 'Climate Tools Finder' CPD launched online to members on RTPI Learn.

Brand:

Creating a new brand strategy is a strategic corporate goal to underpin the work on GROWPLAN in terms of identifying the right brand values to take the organisation into the future. The Board of Trustees deferred the work on this until 2021/2022.

Business planning:

The sudden changes to the way we delivered our work during 2020 impacted the ability for the Institute to implement three-year business planning. The business plans were created for 2020 delivery to focus activity on delivering the corporate strategic goals. The move to three-year business planning will now commence from 2022 onwards.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Diversifying Sources of Income:

The COVID-19 pandemic had a direct impact on some of the main sources of non-subscription income. In the case of our events and training services it was largely possible to cancel booked venues without cost when restrictions on face-to-face meetings were introduced.

The RTPI transformed and redesigned the high quality value RTPI Training CPD programme from face-to-face masterclasses (January-March) to fully online course delivery (June-December), supporting members on key skills and planning practice and delivering income to the RTPI. The Training CPD programme of 40 courses was launched and endorsed as Core CPD content, with masterclasses hosted online through RTPI Learn including topics on the RTPI's priority themes of climate action, and diversity and inclusivity.

The national conference (the Planner Live) was held as a virtual event free of charge to members so did not realise any surplus income, and the Minerals Conference (held in partnership with the Minerals Products Association) was cancelled in 2020 as a result of the pandemic. The successful RTPI Awards for Planning Excellence were screened as a live YouTube event attracting nearly 4,000 views.

Subscriptions to the popular RTPI Consultants Directory remained strong on the back of increased directory traffic. The biggest loss to the Institute's commercial income was the significant downturn in recruitment advertising during the periods of lockdown which affected Planner Jobs.

Planning Aid England (PAE) undertook considerably more consulting work than originally envisaged, delivering projects from March to the end of December using teams comprising PAE staff together with community engagement specialists. These were overwhelmingly providing advice and support in the role of "neutral facilitator" to parish and town councillors affected by several periods of public consultation various infrastructure proposals. In addition we undertook a search exercise to supply candidates for the role of chair of a community engagement forum.

Governance:

We launched a new online nominations and elections process for Nations and Regions, using RTPI's shared online voting platform. Committees adapted quickly to virtual meetings, many reporting higher attendance rates as a result. A review of the Senior Executive Team took place in 2020. Changes to the structure were implemented and we have successfully appointed to all vacant positions in 2020.

The Trustees commissioned the board effectiveness review from the NCVO in 2019 in line with the Charity Governance Code to review the working and governance arrangements of the RTPI and to assess whether the governing documents of the RTPI are fit for purpose. The review was completed in July 2019. During 2020, the Trustees, in consultation with the RTPI General Assembly have been continuing to consult on the recommendations received from the review.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Delivery of the Corporate Strategy Pillars in 2020

Value of Membership:

Membership Growth:

Despite the sudden and unexpected economic and social changes as a result of the global pandemic, there was an overall growth in membership of 2.1% in 2020. The total number of members reached 26,155 at the end of 2020, this is the first time the Institute has ever reached over **26,000 members**. The main growth areas in membership in 2020 have been in two of the pipeline classes (Students and Affiliates), representing an increase of 6.2% in 2020. The free Student membership class continues to grow and increased by 12.3% in 2020. Growth amongst student members and those at an early stage in their career represents an important growth in the pipeline of planners to ensure a sustainable future for the Institute.

- The number of Students converting to Licentiate membership continued to grow in 2020, reaching a conversion rate of 58.4%. The number of conversions increased by 11.8% in 2020 compared to 2019.
- The number of conversions from Licentiate to Chartered Member also increased in 2020, increasing by 14% in 2020 compared to 2019.
- The overall Licentiate Assessment of Professional Competence (L-APC) first-time pass rate in 2020 was 50.8%. This is the highest annual first-time pass rate on record for the L-APC. The first-time pass rate increased by almost 10% in 2020. This was due to the new Membership Guidance launched in 2019.
- The number of elections to Chartered membership increased by 10% in 2020 compared to 2019.
- The overall membership retention rate for 2020 remained high at 93.3%.

New Membership APC Guidance

This year the new Membership Guidance was implemented for candidates applying for Chartered, Associate and Legal Associate membership from January 2020 (launched in June 2019). The new guidance reflects on learning gained following implementation of the comprehensive Routes to Membership review (2014-2016) and clarifies where questions have arisen from stakeholders. The new guidance provides clarity to candidates and assessors, which has helped to increase the first-time pass rates. As a result of the new guidance, the overall L-APC first-time pass rate increased by almost 10% in 2020, reaching the highest pass rate on record for the L-APC. Furthermore, this resulted in a 10% increase in the number of elections to Chartered membership in 2020.

GROWPLAN: Membership growth is firmly embedded in the new Corporate Strategy 2020-2030 with a deliverable of a comprehensive membership growth and support strategy. In the Autumn 2020 the Board of Trustees agreed GROWPLAN – the ten-year membership growth and support strategy to sit alongside the Corporate Strategy. GROWPLAN is an internal document setting out priorities for membership growth and will start to be implemented from 2021 onwards.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Value of Membership (continued):

NURTURE: This year we have worked with Women in Transport to scope a pilot mentoring programme, specifically for mid-career planners. This will be the first formal mentoring programme to be offered by the Institute and is due to be launched in February 2021.

The national conference the Planner Live Online was held as a week of webinars and video contributed to for the first time from all regions and nations and achieving an attendance of circa 5,000 members and stakeholders. This event was held in early June 2020 and discussions focussed around recovering from the pandemic in a greener, healthier way – highlighting the thought leadership of the planning profession during a time of crisis.

This year's RTPI Scotland Annual Conference was transformed into The Scottish Planner Live comprising a series of ten shorter online events over the week 28 September to 2 October. It looked at a range of issues around health, planning and placemaking. The Sir Patrick Geddes Commemorative Lecture was, for the first time, held online. It explored “Shaping the new normal with a wellbeing economy: The role for place and planning” and was given by Katherine Trebeck, Advocacy and Influencing Lead for the Wellbeing Economy Alliance.

The RTPI Cymru Annual Conference Welsh Planner Live was a week's programme of free webinars focused on *Planners taking climate action* between 21 and 25 September. Welsh Government Minister, Julie James MS spoke and launched the Placemaking Wales Charter during the week. There were almost 1,000 delegates attending live across the week and a further 770 views on YouTube.

A record 50 candidates applied for **Chief Planners of Tomorrow** – the RTPI's national initiative that allows Young Planners to spend the day shadowing Chief Planners. Ten participants were able to shadow Chief Planners for the day before lockdown. Subsequent visits have taken place virtually.

The national **Young Planners Conference** was held in November 2020 for the first time as a virtual conference, free of charge to young planner members. The organising committee was comprised of the Chairs of the Young Planners Committees, the 2019 Young Planner of the Year and the Board of Trustees Young Planner representative. The Hong Kong Planning Institute Young Planners also contributed a webinar as part of the conference. Over 400 delegates attended the conference.

Young Planners Cymru (YPC) have had a positive year, holding a successful 'speed networking' and pizza event in February and online events discussing One Planet Developments in Wales and Planning Dementia Friendly Communities.

The Wales Young Planner of the Year 2020 was awarded to Emmeline Reynish MRTPI, a planner with Arup in Cardiff and Chair of Young Planners Cymru. The panel also Commended Kate Coventry, a planner with LRM Planning.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Equality, Diversity and Inclusion (EDI):

CHANGE:

The CHANGE Action Plan was launched by President Sue Manns to coincide with the West Midlands Members Reception hosted by the University of Birmingham.

The Institute's first **Equality, Diversity & Inclusion Manager** was appointed to develop the **RTPI CHANGE** action plan, which was adopted in February 2020. The English Regions explored opportunities to collaborate with other EDI networks such as BAME Planners Network, Women in Planning and Neurodiversity in Planning, London Region hosted an event *Neurodiversity in Planning: Let the conversation begin* and held a round table with President Sue Manns.

Although the focus of CHANGE is external, it is equally important that the RTPI can demonstrate best practice as an employer. We continue to raise awareness, educate and encourage input from colleagues about how we can ensure that the RTPI is as inclusive and diverse as it can be.

The RTPI Trust diversity bursary scheme for undergraduate entrants, and the RTPI Future Planners bursary scheme to attract new Masters students continued to broaden and promote the profession, and convert students into RTPI members.

Apprenticeships:

In May 2020 we launched the fourth route to Chartered membership, the Degree Apprenticeship-APC (DA-APC) route. The new route is part of the Chartered Town Planner Apprenticeship End Point Assessment. The first intake of Chartered Town Planner apprentices will start to complete their apprenticeship and apply for Chartered membership from September 2021 onwards. Education guidance and resources on the Degree Apprenticeship End Point Assessment were published for employers and universities, to aid the development of apprentices into the planning system.

A Survey of Chartered Town Planner Degree Apprentices was completed showing a broadening of access and routes into a planning career: 51% from non-degree backgrounds, 10% non-white, 51% female. The scheme is supporting the public sector in new recruits, career changers and upskilling existing technical staff. We have ten degree apprenticeship providers in England (RTPI-accredited planning schools) with over 240 apprentices on the programme.

A proposal for new Town Planning Assistant apprenticeship scheme secured in principle approval from UK Government. RTPI Scotland has been supporting Skills Development Scotland to commission research on planning skills and careers as part of developing the case for a planning apprenticeship programme in Scotland. Discussions continue for roll-out to other UK nations, subject to skills policy of devolved administrations.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Equality, Diversity and Inclusion (EDI) (continued):

Promoting planning as a career:

To celebrate Black History Month and **#RTPICHANGE** a new education film was produced and promoted featuring two rising star MRTPI's showing the diversity of younger members, promoting chartership, exciting careers in planning, and top tips and skills for students.

Agent Plan-It 'Challenge for Change' school competition was held, judged by President and the winners were announced.

Volunteers in the RTPI North West region visited five schools to talk to students about their careers as planners, reaching a collective audience of over 350 students.

Supporting communities:

PAE casework support is given free by volunteers and focussed towards on individuals and groups based in the most deprived parts of the England who cannot afford to employ a planning consultant. PAE received and assisted with 23 pieces of casework in 2020; with advice and support being delivered virtually throughout 2020.

A particular casualty of the lockdown was that the PAE Support project (designed to help enable groups and individuals who meet our criteria for further support to engage with the planning process in some key target areas) could not progress as planned as it relied on face-to-face events taking place. However as the year progressed we have developed proposals to deliver this project virtually, which we aim to take forward in 2021.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Supporting Planning Services:

A number of initiatives were launched during 2020 to support planning services during the pandemic:

The **RTPI Learning Partner of Year Award** went to Optimis Consulting – announced by the RTPI President in recognition of its excellent graduate support scheme. This award is important to highlight the work of the RTPI Learning partners in supporting their planning teams.

Supporting planning schools:

All 32 annual Partnership Boards to quality assure planning education and RTPI accreditation was completed on time and converted to online meetings in March – April because of university strikes and coronavirus. A data gathering exercise on Planning School mitigation measures and effect on Learning Outcomes was completed to support university partners on COVID-19 teaching impacts and evaluation. The RTPI English Regions continue to reach out to support our Planning Schools, hosting a dedicated event for employers to promote RTPI Degree apprenticeships with Anglia Ruskin University. A new virtual RTPI careers talk session recorded with President, Vice President and Young Planner Network Chairs - to go global to all planning schools on the RTPI YouTube channels. Young Planners supported the Education Team to reach out to students in our Planning Schools - virtual visits have taken place to University of Liverpool, Newcastle, Manchester, Sheffield Hallam, ARU, Brighton, Oxford and Reading.

Supporting Local Authorities:

Several local planning authorities were directing members of the public to Planning Aid England's services. Our e-mail advice service received a total of 1,773 requests for support and advice in 2020 and averaged a satisfaction rating by service users of 85%; we also recruited additional panel members who were trained in February and December (those trained in December joined the panel in early 2021). PAE received also over 100,000 hits on its advice and guidance website: www.planningaid.co.uk during 2020; in addition, staff completed a project in association with a panel of chartered volunteers to update.

The RTPI supported the Local Government Association's *Return to Planning* project to support new and existing talent back into the workplace, with opportunities for non-members to access our membership and e-learning products.

RTPI North West hosted a Local Planning Authorities (LPA) Champions lunch with President Sue Manns. The aim of the Champions network is to foster stronger relationships between the RTPI and Local Authority Planners and leads on from work initiated in the Yorkshire region.

RTPI Ireland continued to engage with the new Office of the Planning Regulator through membership of its advisory group looking at the Methodology for Conducting Reviews of Planning Functions and the National Planning Knowledge Group.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Raising the Profile of Planning:

Chartered status as the Gold Standard:

In 2020, we enhanced our APC webinar series in response to COVID. We launched new APC monthly bitesize webinars to sit alongside the existing monthly APC training webinars. We aim to reach as many candidates as possible to support them through the APC process to gaining Chartered membership.

This year we put in place an anti-plagiarism software for APC candidates to enhance our already rigorous internal quality assurance to ensure integrity in the APC process and assessment model. The software has been piloted and will be rolled out for all APC submissions in 2021. We also developed and implemented a new corroboration verification procedure this year as part of our internal APC quality assurance. We now have a formal monitoring programme in place to verify corroborators for the APC.

In 2020, we grew our APC assessor pool by over 10%, in preparation for the first intake of Chartered Town Planner apprentices applying through the new route to Chartered membership from September 2021 onwards. APC assessors undertake annual training to ensure integrity in the APC assessment model.

This year we published **Sanctions Guidance** to summarise the sanctions that can be imposed by the RTPI's Conduct and Discipline Panel or a Conduct and Discipline Appeal Committee. It outlines the purpose of sanctions and the factors to be considered when deciding upon what sanctions to impose. The Sanctions Guidance is also intended to assist complainants and members understanding of the disciplinary decision-making process, demonstrating transparency in the process. It will be used by the RTPI's Conduct and Discipline Panel and any Appeal Committee when deciding on any appropriate sanction where members are found to be in breach of the Code of Professional Conduct.

Presidential visits:

A programme of 'virtual' [Presidential visits](#) was established, with the first hosted by London. Since then, the President has toured the Nations and Regions, with the virtual environment allowing for visits further afield such as 'Planners on the Islands – Jersey, Guernsey and Isle of Scilly'. These have proven very popular with members and we will be introducing a hybrid online/in person model for 2021.

Public Affairs:

England:

The RTPI successfully worked with the UK Government to call for temporary changes on the expiry date of permissions in England. The RTPI submitted its best practice case studies on local planning authorities' response to the pandemic to the Ministry of Housing, Communities and Local Government (MHCLG) in England.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020

(continued)

Raising the Profile of Planning (continued):

The RTPI responded to 18 government consultations. In England, more than 100 members from across each region actively contributed to RTPI's response to the White Paper, providing local insight and intelligence through dedicated Roundtable sessions. Following signs that the Government wished to embark on changes to the planning system the RTPI published *Priorities for Planning in England* to lay out our stall. We provided the public and also the sector with a guide to zoning systems round the world. Following widespread internal consultation we responded to the White Paper, indicating areas such as growth areas where we could demonstrate support, and other areas such as so-called renewal areas where the proposals seem insufficiently well worked out. Meetings were held with Ministers and MPs throughout 2020 virtually.

The All Party Parliamentary Group on Housing and Planning was reconvened with the RTPI as the Secretariat, and following its meeting on the White Paper on planning reform: "Planning for the Future" published a report echoing many of the points made by the RTPI.

Work continued with the Joint Institutes of the Built Environment – RIBA, RICS, CIOB and the RTPI – and several letters were sent to Ministers on permitted development rights and housing.

Scotland:

RTPI Scotland was funded by the Scottish Government to deliver an engagement programme with the profession to help inform NPF4 which comprised events organised through the Scottish Chapters and a report and series of blogs arising from each event; three online events looking at learning from international practice in Finland, Australia and Ireland; an edition of the Scottish Planner journal around NPF4. RTPI Scotland responded to the Scottish Government's call for ideas on the 4th National Planning Framework by publishing a paper outlining '10 Big Ideas'. RTPI Scotland responded to 12 policy consultations from Scottish Government, agencies and other organisations and to four calls for evidence from the Scottish Parliament covering issues around post-COVID recovery, town centres, permitted development rights, resources for planning and infrastructure. Evidence was presented online to the Scottish Government's Just Transition Commission, the Law Society of Scotland, the Infrastructure Commission for Scotland and the Town Centre Action Plan Review Expert Group. RTPI Scotland is involved in over 20 advisory groups including the Ministerial High Level Group on Planning Performance; the Vacant and Derelict Land Taskforce; the Centre for Collaborative Housing Evidence (CaCHE) and the National Walking Strategy Delivery Forum.

Ireland:

RTPI Ireland published and promoted a joint Manifesto for the 2020 Election along with the Irish Planning Institute which set out our key 'asks' for the next Irish Government and responded to consultation on the National Marine Planning Framework and the Housing and Planning Development Bill.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Raising the Profile of Planning (continued):

Wales:

During 2020 we responded to 19 Welsh Government consultations on a wide range of topics. In addition we provided oral and written evidence to a number of the Senedd Cymru / Welsh Parliament Committees including: the resourcing and performance of Local Planning Authorities, the implementation of the Well-being of Future Generations (Wales) Act 2015 and Future Wales (the National Development Framework). We have collaborated with the Institute of Welsh Affairs (IWA), supporting their Welsh Towns initiative and the Director spoke on a panel at the Rethinking Wales webinar on the future of towns.

RTPI Cymru participates with other built environment bodies in in the Built Environment Alliance Cymru (BEAC) to organise topical discussion events. This included the Chair, Simon Power, who spoke on a panel to discuss 'Saving our Town Centres'.

Campaigns:

In June 2020 the RTPI 2020 President, Sue Manns FRTPI launched our first major national campaign; **#Plan the World We Need** at the Planner Live online conference. This campaign was to promote the importance of the role of planners in ensuring a greener, healthier and more economically sustainable recovery from the pandemic. The campaign was based on a major policy report also called Plan the World We Need. The campaign encompassed all nations, and was particularly focussed towards Westminster ahead of the consultation on the planning reform white paper. The campaign generated a great deal of support and was a social media hit – with over 30,000 impressions for our launch Tweet. We produced a video and series of shorter video messages which were widely promoted across all platforms and generated in excess of 10,000 views; it was shared on stakeholder platforms too. The campaign was referenced throughout the year on all relevant reports, had 27 mentions in the wider media and in the parliamentary affairs work, generating meetings with MPs, MSPs and members of the Welsh Assembly. The Annual World Town Planning Day school competition delivered – this year focused on #PlanTheWorldWeNeed. Open globally, students are asked to pitch a 5-step plan for regeneration of a local area or building. To think like a planner and write a short report or presentation/video.

The campaign achieved its target of influencing the draft white paper on English planning reform, it was referenced twice in the white paper "Planning for the Future" and the RTPI was the only membership organisation to be thanked as a contributor.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Raising the Profile of Planning (continued):

Awards:

The National **RTPI Awards for Planning Excellence** were held for the first time ever as a virtual ceremony with 125 projects and people entered. Our Regional Awards in the **English Regions** were held as part of a week-long celebration, premiered on the RTPI's YouTube channel on 16-20 November. Hosted by President Sue Manns, and our Regional Chairs, the virtual ceremonies also included 'selfie' videos from our inspiring Young Planners and reached a combined audience of 2,500. The **RTPI Cymru Planning Excellence Awards 2020** were also held with [five Finalists](#).

In 2020, six successful APC candidates were awarded with an **RTPI Commendation**, by the Membership Assessment Advisory Panel, for submitting high quality APC submissions for Chartered membership.

Media:

In 2020 we had almost 500 media mentions including national coverage in The Times and in broadcast media including BBC Breakfast. Our social media channels continue to grow; in 2020 the RTPI's YouTube channel saw the biggest increase and overall there were 54,027 views. LinkedIn grew by over 6,000 followers. Twitter grew by 2,500 followers and now stands at 21,500 followers and the total number of times our tweets were seen was 5,255,300.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Delivery of the Corporate Strategy Foundations and Pillars in 2021 and Beyond

Since the adoption of the Corporate Strategy 2020-2030 in January 2020 work began to identify priority projects for delivery in 2020 and 2021 from the 58 projects identified under the strategy's four pillars and foundations, through a programme of engagement with standing committees, management boards and the General Assembly and Board of Trustees.

Business as usual work will continue to focus on delivering workstreams under the Corporate Strategy, and in addition of the 18 projects identified to deliver in 2020/2021 the RTPI will be delivering the following projects in 2021:

Corporate Strategy Foundations:

Professional Volunteering

A dedicated resource will be employed by way of seed funding to lead the early delivery of some of the projects, with a small budget for delivery. 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.

Member Services

Work will continue to enable more tailored member communications through our digital transformation and enhanced communications capabilities. Work will continue to create and deliver a modern events strategy that provides member value, underpins our "One Institute" objective and supports our climate action objectives.

Nations and Regions

Through engagement with members a "One Institute" model will be developed to ensure that members across the UK and Ireland and beyond can access services and support in a seamless and consistent way that also reflects regional and local needs.

Digital Transformation

We will continue to build on the digital innovation and modernisation of the RTPI's operations and services to support members, new ways of working and our climate action objectives.

Climate Action

As the RTPI continues with its digital transformation, the RTPI will continue to adopt a "digital first" principal to minimise travel, print and postage that have been identified as our largest carbon contributors through the RTPI's Climate Action report of 2020.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Research and Policy

Members will be consulted on the research priorities for 2022-2025. The promotion of the Planning Theory and Practice journal will be mainstreamed through the three-year cycle of the business planning for all relevant RTPI teams.

International Strategy

The new International Strategy will be launched in early 2021 and work will begin on its implementation.

Diversifying Sources of Income

Work will continue to review our financial processes and income streams that are additional to membership subscriptions, to ensure that existing or new sources of additional income.

Right Home for the RTPI

The “new normal” of post-pandemic ways of working will influence the ongoing work to identify the best solutions for delivering RTPI products and services for members by the RTPI officers. This will include enabling enhanced member benefits (e.g. through dedicated member space within the RTPI’s offices) as well as supporting the RTPI’s climate action objectives.

Business Planning

Three-year business plans will be developed in 2021 for delivering the corporate strategic objectives in 2022 – 2025.

Governance

The work to implement the Governance Review will continue and members will be encouraged to vote on the proposed changes to the RTPI’s governance mechanisms and structures in line with the legal requirements under our by-laws.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Corporate Strategy Pillars:

In 2021 work will continue across the Institute to deliver projects and business as usual work under the four pillars of the Corporate Strategy. In particular the focus will be on the following projects:

Value of Membership

GROWPLAN

An implementation plan will be developed to deliver the strategic objectives identified through the GROWPLAN strategy, adopted in 2020.

Chief Planners of Tomorrow

Dedicated resource will be brought in to ramp up coordination of the Chief Planning Officers of Tomorrow activity and the project will run initially for two years at which time it will be evaluated to ascertain whether it can be blended into existing roles or requires a permanent resource going forward.

Host an Annual Welcome Event for Members

Work will continue to scope and create a welcome event for members who have been elected as Chartered members for delivery in 2022.

RTPI Events Strategy

Work will continue to support life-long education and skills and professional network development through opportunities for our members to attend conferences, seminars, webinars and training events through a new strategy. We will look at new models for delivery in line with the climate action goals, the value proposition work through GROWPLAN, the "One Institute" model and the corporate strategic goal to create the planning profession's "must attend" national conference.

Supporting Member Services

Heads of Planning Everywhere (HOPE)

Utilising its unique convening power the HOPE project will continue as an embedded project for the RTPI to continue to build the network of head and leading planners to advocate the strategic role of planners as being pivotal to the delivery of a wide range of community, local authority and governments' objectives.

Politicians In Planning Network

The aim of launching a new Politicians in Planning Network (PIP), (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. PIP will be launched in Q2 of 2021.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Raising the Profile of Planning

Additional capacity will be brought in to the RTPI in 2021 with a new Director of Communications role to enhance our work to raise the profile of planning and to deliver the **YOURPLAN** campaign – a targeted campaign to promote the public understanding of planning and the **PLANNING IS GREAT** campaign to promote the value of UK planning professionals as a service industry export through the Department of International Trade's Britain is Great campaign.

Equality Diversity and Inclusion

Additional capacity has been brought in to deliver this vitally important strategic priority to increase the opportunities to enter and progress within the planning profession, to broaden the range of talent coming into the profession and for a more diverse and inclusive profession that truly reflects the communities that planners work on behalf of. In 2021 we will focus on:

CHANGE

A report will be published on the first year of delivering the CHANGE programme to encourage better representation within the planning profession.

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.

Education for Everyone Review

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

Work Experience Pilot

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

Work will continue with national governments and education providers to develop **Apprenticeships** in all UK nations.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020

(continued)

Structure, governance and management

The RTPI is a body politic and corporate established in 1914 and granted a Royal Charter in 1959 as amended by a Supplemental Charter granted in 1971 and by orders in Council from 1982 to 2001. The Royal Charter was comprehensively updated by a Supplemental Charter granted in 2003, which was further amended in October 2012, and the new governance arrangements are effective from 1 January 2013.

The Chair of the Board of Trustees is elected by the General Assembly for a term of two years, eligible to be re-elected for a further term of two years. Trustees are elected by the General Assembly. Corporate Members who have held office in any capacity with the Institute's governance structures for at least two consecutive years during the previous five are eligible to stand for election as Vice President. Once Vice President, the Trustee moves forward at the start of each subsequent year to become President and Immediate Past President respectively. Members of the General Assembly elect up to three Trustees each year to serve for a two-year period and also a young planner from those nominated by the young planners for a two-year period each alternate year. The General Assembly will elect one Chartered member to represent the Regions and Nations (excluding Scotland), and one to represent Scotland. The Board of Trustees may elect up to two co-opted Trustees for such renewable terms as the Board of Trustees may determine.

In 2016, the Trustees agreed to appoint two co-opted independent Trustees to provide additional skills in finance and marketing and communications. These Trustees took up their roles in 2017 and in 2019 respectively. The Board of Trustees evaluated its skills and re-appointed the co-opted Trustee with the finance expertise for another term of two years. The Trustees agreed to discharge the co-opted Trustee with the marketing and communications; and advised to seek a new co-opted Trustee with digital transformation, and CRM expertise.

Newly elected Trustees attend an RTPI induction session to understand an overview of the current work plans and structure of the RTPI. From 2021 onwards, all Trustees will be offered the opportunity to attend training on Trustee duties and legal responsibilities.

The General Assembly comprises the following representatives, all elected following a call for candidates published to all members: 28 Fellow and Chartered Members; 2 Legal Members or Legal Associates; 2 Associate Members; 6 Student Members or Licentiates; one representative from each Region in England, 2 from RTPI Cymru (Wales), 2 from RTPI in Ireland, 2 from RTPI in Scotland.

Subsidiary Undertaking

RTPI Services Limited, which is a wholly owned subsidiary of RTPI, ceased to trade with effect from 1 January 2019. Its assets and liabilities have been consolidated in this set of financial statements. The subsidiary is now immaterial to the group so next year charity only accounts will be produced.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Decision-making

The structure, governance and management section of the annual report outlines the formal roles of elected volunteers on the RTPI Board and the General Assembly.

The Board of Trustees have ultimate responsibility for governing the Institute and directing how it is managed and run, the delivery and management of day to day activities is delegated to the Chief Executive and the senior staff team as set out on page 5.

The work of the Trustees is supported by the following Committees, which report to the Board of Trustees:

Standing Committees and Panel:

- Education and Lifelong Learning Committee
- International Committee
- Membership and Ethics Committee
- Policy, Practice and Research Committee
- Nations and Regions Panel

At least 51% of the membership of the Standing Committees and Panel are elected General Assembly members.

Other Committees:

- Audit Committee
- Finance Committee
- Nomination Subcommittee
- Appointment and Remuneration Committee

Risk review

The Trustees have identified and regularly review the major risks to which the Royal Town Planning Institute is exposed. In 2020, the Risk Register underwent a complete review. The Trustees monitor the management controls and actions in place to manage the risks. The risks are reviewed by the staff of the Institute and the Trustees on an ongoing basis and the risk register updated accordingly.

The principal risks identified during this process are:

Chartered membership loss – key elements in the management of this risk include:

- Strategies to increase conversion to Licentiate and Chartered membership
- Promotion of the value of membership – to the public and private sectors
- Routes to membership framework
- Member focussed subscription reminder/renewal process
- Employer engagement – Learning Partnerships with employers
- Continued development of an apprenticeship offer
- Postgraduate student bursary scheme converting undergraduates to planning
- Implementation of a membership growth and retention strategy: GROWPLAN.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020

(continued)

Failure to maintain essential services – key elements in the management of this risk include:

- Business Continuity Plan in place and annually reviewed
- Disaster Recovery Plan in place and annually reviewed
- Six monthly testing of Disaster Recovery Plan communications
- Upgrade of server software and move all applications to cloud based operation
- Introduction of two factor authentication for systems access
- Systems upgrades to most secure supported operating platforms
- Replacement of hardware and use of more secure devices

In response to the COVID-19 pandemic the Trustees have identified the need to review the potential impact across all of the risks in the risk register and have put in place the following risk actions and controls to manage, monitor and mitigate the risks.

- The Chief Executive has put in place a weekly meeting to ensure that the Institute can respond quickly to emerging issues. The COVID-19 meeting has been named the Gold call. Membership of the Gold Team includes all of the Senior Executive Team plus the Head of HR and Office Services.

The Gold call has a standing agenda, which comprises

- Health & Wellbeing of Colleagues, Volunteers and Members
- A review of the latest government advice across the UK and Ireland
- Business continuity issues (input from IT, Finance and Human Resources)
- Budgetary implications
- COVID-19 Communications (Members and Colleagues)

- All RTPI colleagues are currently working from home.
- No colleagues have been furloughed and the focus has been to continue to provide value to RTPI members by replacing face-to-face events with free virtual events and establishing an online COVID-19 hub to keep members informed of the impact of COVID-19 on planning services.
- All colleague and volunteer travel has been cancelled up until late August 2021 and this decision will be reviewed in July 2021.
- All face-to-face events have been cancelled up until late August 2021 and this decision will be reviewed in July 2021.
- No formal decision has yet been made with regard to returning to office based working but will not be before late August 2021. A review of each office location and the controls and actions required to comply with relevant government guidelines is ongoing together with an ongoing dialogue with colleagues about their health and safety concerns and the use of public transport for their journey to the office.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020

(continued)

Governance Portal

Supporting the good governance practices, the Trustees invested in the governance portal to have a secure platform that allows the Trustees to access the Trustees/Committee Meetings papers; governing documents; structures; etc. This new tool will support more effective remote working for the Trustees; is secure and will eliminate the added cost that paper reporting carries.

Board Effectiveness Review

The Trustees commissioned the board effectiveness review from the NCVO in 2019 in line with the Charity Governance Code to review the working and governance arrangements of the RTPI and to assess whether the governing documents of the RTPI are fit for purpose. The review was completed in July 2019 and since then the Trustees in consultation with the RTPI General Assembly are working on implementing the recommendations received from the review.

Volunteers

Local members in the RTPI nations and regions volunteer to work on national and regional committees. These committees support the work of the RTPI's national and regional staff in the delivery of local events and the charitable work of the Institute.

The RTPI wishes to thank all volunteers for their contributions to and continued support of the work of the Institute during a particularly challenging year.

Pay policy for senior staff

The pay of all RTPI staff excluding the Chief Executive is reviewed annually based on a recommendation from the Chief Executive and approval by the board of Trustees. The recommendation takes into consideration a number of factors including:

- affordability including RTPI performance against budget, reserve levels and projected performance for the current financial year
- external factors such as CPI and pay levels in other comparable organisations
- the full value of RTPI benefits such as pension contributions
- recruitment and retention rates
- UK and London living wage
- the pay multiples – the ratios between the highest and lowest salaries, and the highest and the median salaries of an organisation

The Chief Executive's Appraisal Panel (comprising Board members) reviews on an annual basis the performance of the Chief Executive and recommends any annual pay award. The panel takes account of the factors listed above; including the impact on the organisation's pay multiples, when recommending the level of the annual pay award for the Chief Executive.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Financial review

Net income for the year after investment gains was £80k (2019: £301k).

The coronavirus pandemic inevitably had a very significant impact on the Institute's ability to derive revenue from physical events, reducing total income by 19% to £6,578k (2019: £7,688k). However, membership income was not affected by the pandemic – almost all of the 2020 subscriptions had been collected before the pandemic's economic impact began to be felt, and there was no increase in membership cancellations during the year. Subscriptions' income was up by 1.8% to £5,000k (2019: £4,814k).

Despite the Institute managing to continue many of its activities online during the year, the events were almost all provided free of charge. As a result, the proportion of income derived from membership subscriptions rose to 80% (2019: 68%). A charging model has been developed and is being implemented in 2021 to ensure that a wide range of online services can continue to be offered once the Coronavirus restrictions have been lifted and physical events are permitted to resume.

The areas impacted most by the virus were: CPD Activities (down from £423k in 2019 to £39k in 2020, a fall of 92%); Training (down from £287k to £75k, a fall of 75%); Event Sponsorship (down from £207k to £75k, a fall of 76%) and Conferences and Awards (down for £207k to £11k, a fall of 95%).

The cancellation of all physical events for almost the entire year led to direct savings on venue hire and event costs (a £335k saving compared to 2019, down 65%), and the digital distribution of The Planner magazine provided further savings. There were also indirect savings in almost all areas as a result of reduced activity and the move to remote working. Costs overall were down by 21% at £6,645k (2019: £7,664k). Employment costs were the only significant exception, rising 4% to £3,653k (2019: £3,516k).

During 2020, the newly established Finance Committee has reviewed the existing investment portfolio in the light of the updated investment policy, interviewed prospective fund managers and made recommendations to the Board of Trustees on additions and changes to the existing portfolio. The investment recommendations have been approved by the Board and new investments managers were in the process of being instructed at the year end with new accounts open.

An amount of £2,616k was received in final settlement of the West Sussex Pension Scheme. This amount had been fully accrued in previous years and did not affect the result in the current year.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Investment policy and performance

The long-term objective of the investment performance is to achieve a return of inflation (Consumer Prices Index (CPI)) plus 2% per annum (net of management fees) and to pursue a balanced overall long-term risk. Our ethical policy is to select investment managers that are committed to and expert in ethical investment and that they are a signatories to the UN Principals of Investment. Our focus is for our investment managers to identifying and investing in businesses that are working towards a more sustainable future; with this strategy being based on a positive values assessment rather than negative screening. In addition we expect them to consider such factors as carbon footprint, resource use, waste reduction and gender equality.

The net unrealised gains on investments was £147k (2019: £277k). The current investments are split between funds which seek to grow and maintain their capital value, and those which realise an annual return. Investment income was £42k (2019: £65k). Returns for the year were better than the target set in the policy: Total return for the year was 9.2% verses December 2020 CPI plus 2% of 2.6%.

Reserves policy

The Trustees reserves policy methodology for the calculating the level of the general reserve required is based on an analysis of the financial risks faced by the Institute. Based on this approach, the level of general reserves the Institute has deemed appropriate to hold is £3,895k (30% of operating income and 25% of operating costs plus £500k). This figure has been temporarily depressed by the impact of the virus and would be expected to return to a higher level once full activity resumes (2019: £4,571k). As at 31 December 2020 the general reserve is £8,018k. The Institute is therefore holding excess reserves of £4,128k.

The Trustees have agreed on a policy of maintaining a breakeven operating budget while allocating additional funds to approved projects from these excess reserves. The principal projects underway are related to the Corporate Strategy Implementation Plan, which was allocated £170k during the year, of which £67k had been spent by the year end, and the Digital Transformation project, allocated £73k, of which £23k had been spent. In addition, a COVID-19 fund was made available to allow for IT equipment and subscription services to facilitate remote working with £48k being utilised.

The reserves are invested in fixed assets, listed investments and short-term deposits. The fixed assets include the freehold property in London used for the charitable activities of the Institute. A separate designated reserve has been created equal to the net book value of fixed assets not financed by restricted funds or other designated reserves. The tangible fixed asset reserve stood at £1,370k at the year end (2019: £1,435k).

Details of other designated funds created by the Trustees are in note 13.

Restricted funds are those received for specific purposes, details are provided in note 13.

THE ROYAL TOWN PLANNING INSTITUTE

ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020
(continued)

Statement of Trustees' responsibilities

The Trustees are responsible for preparing the Annual Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England & Wales and Scotland requires the Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the Trustees are required to:

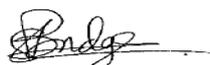
- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP (FRS 102);
- make judgments and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The Trustees are responsible for keeping proper accounting records, which disclose with reasonable accuracy at any time the financial position of the charity and the group and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 and the Charity's constitution. They are also responsible for safeguarding the assets of the charity and the group and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Provision of information to auditors

The Trustees in office on the date of approval of these financial statements confirm that as far as they are aware, there is no relevant audit information of which the auditors are unaware. The Trustees have taken all of the steps they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

Approved by the Trustees on 26 May 2021 and signed on their behalf by:



Susan Bridge – Chair of the Board

THE ROYAL TOWN PLANNING INSTITUTE
INDEPENDENT AUDITOR'S REPORT TO THE TRUSTEES OF THE ROYAL TOWN
PLANNING INSTITUTE (RTPI)

Opinion

We have audited the financial statements of The Royal Town Planning Institute ("RTPI") for the year ended 31 December 2020 which comprise the Consolidated and Charity Statement of Financial Activities, the Consolidated and Charity Balance Sheet, the Consolidated and Charity Cash Flow Statement and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- give a true and fair view of the state of the group's and of the parent charity's affairs as at 31 December 2020 and of the group's and parent charity's net movement in funds, including the income and expenditure, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Charities Act 2011 and the Charities and Trustee Investment (Scotland) Act 2005 and regulation 8 of the Charities Accounts (Scotland) Regulations 2006.

Basis for opinion

We have been appointed as auditor under section 144 of the Charities Act 2011, and section 44(1)(c) of the Charities and Trustee Investment (Scotland) Act 2005 and report in accordance with the Acts and relevant regulations made or having effect thereunder. We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the group in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the group's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The trustees are responsible for the other information. The other information comprises the information included in the Annual Report of the Trustees. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information; we are required to report that fact. We have nothing to report in this regard.

THE ROYAL TOWN PLANNING INSTITUTE
INDEPENDENT AUDITOR'S REPORT TO THE TRUSTEES OF THE ROYAL TOWN
PLANNING INSTITUTE (RTPI) (continued)

Matters on which we are required to report by exception

We have nothing to report in respect of the following matters in relation to which the Charities (Accounts and Reports) Regulations 2008 and the Charities Accounts (Scotland) Regulations 2006 require us to report to you if, in our opinion:

- adequate accounting records have not been kept by the parent charity, or returns adequate for our audit have not been received from branches not visited by us; or
- sufficient and proper accounting records have not been kept; or
- the parent charity financial statements are not in agreement with the accounting records and returns; or
- we have not received all the information and explanations we require for our audit.

Responsibilities of trustees for the financial statements

As explained more fully in the trustees' responsibilities statement set out on page 35, the trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the group's and the parent charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the group or the parent charity or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

Based on our understanding of the group and the environment in which it operates, we identified that the principal risks of non-compliance with laws and regulations related to its bye-laws and charity law, and we considered the extent to which non-compliance might have a material effect on the financial statements. We also considered those laws and regulations that have a direct impact on the preparation of the financial statements such as the Charity SORP, Charities Act 2011, income tax, payroll tax and sales tax.

We evaluated management's incentives and opportunities for fraudulent manipulation of the financial statements (including the risk of override of controls), and determined that the principal risks were related to posting inappropriate journal entries to revenue and management bias in accounting estimates. Audit procedures performed by the engagement team included:

- Inspecting correspondence with regulators and tax authorities;
- Discussions with management including consideration of known or suspected instances of non-compliance with laws and regulation and fraud;
- Evaluating management's controls designed to prevent and detect irregularities;
- Identifying and testing journals, in particular journal entries posted with unusual account combinations, postings by unusual users or with unusual descriptions;
- Challenging assumptions and judgements made by management in their critical accounting estimates; and
- Agreeing the validity of recognised receivables on a sample basis and challenging the recoverability assumptions, further assessing for any fraud or bias.

THE ROYAL TOWN PLANNING INSTITUTE

INDEPENDENT AUDITOR'S REPORT TO THE TRUSTEES OF THE ROYAL TOWN PLANNING INSTITUTE (RTPI) (continued)

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of our report

This report is made solely to the charity's trustees, as a body, in accordance with section 144 of the Charities Act 2011 and regulations made under section 154 of that Act, and section 44(1)(c) of the Charities and Trustee Investment (Scotland) Act 2005 and regulation 10 of the Charities Accounts (Scotland) Regulations 2006. Our audit work has been undertaken so that we might state to the charity's trustees those matters we are required to state to them in an Auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

Haysmacintyre LLP

.....
Haysmacintyre LLP
Statutory Auditors

10 Queen Street Place
London
EC4R 1AG

Date: 28 May 2021

Haysmacintyre LLP is eligible to act as an auditor in terms of section 1212 of the Companies Act 2006

THE ROYAL TOWN PLANNING INSTITUTE

CONSOLIDATED STATEMENT OF FINANCIAL ACTIVITIES (including consolidated income and expenditure accounts)

YEAR ENDED 31 DECEMBER 2020

	Notes	General Fund	Designated Funds	Restricted Funds	Total 2020	Total 2019
		£'000	£'000	£'000	£'000	£'000
INCOME FROM:						
Charitable activities						
Membership subscriptions and fees		5,153	–	–	5,153	5,009
Grants and Sponsorship towards the promotion of spatial planning and membership		351	–	195	546	937
Support for members		592	–	127	719	1,396
Planning Aid		111	–	–	111	6
Investments	4	49	–	–	49	76
Other Income		–	–	–	–	264
Total income		6,256	–	322	6,578	7,688
EXPENDITURE ON:						
Charitable activities						
Support for members and promotion of membership of the Institute		3,170	231	148	3,549	4,922
Promotion of spatial planning		2,656	44	145	2,845	2,500
Planning Aid		245	–	6	251	242
Total expenditure	5	6,071	275	299	6,645	7,664
Net income/(expenditure) before investment gains		185	(275)	23	(67)	24
Net gains on investment assets		146	–	1	147	277
Net income/(expenditure)		331	(275)	24	80	301
Transfers between funds	13	(238)	238	–	–	–
Net movement in funds		93	(37)	24	80	301
Reconciliation of funds						
Fund balances at 1 January		7,935	2,133	559	10,627	10,326
Fund balances at 31 December		8,028	2,096	583	10,707	10,627

All income arises from the continuing activities of the Institute. RSL - the trading subsidiary ceased to trade with effect from 1 January 2019.

The notes on pages 43 to 63 form part of these accounts.

THE ROYAL TOWN PLANNING INSTITUTE

CHARITY STATEMENT OF FINANCIAL ACTIVITIES

YEAR ENDED 31 DECEMBER 2020

	Notes	General Fund	Designated Funds	Restricted Funds	Total 2020	Total 2019
		£'000	£'000	£'000	£'000	£'000
INCOME FROM:						
Charitable activities						
Membership subscriptions and fees		5,153	–	–	5,153	5,009
Grants and Sponsorship towards the promotion of spatial planning and membership		351	–	195	546	937
Support for members		592	–	127	719	1,396
Planning Aid		111	–	–	111	6
Investments	4	49	–	–	49	76
Other Income		–	–	–	–	264
Total income		6,256	–	322	6,578	7,688
EXPENDITURE ON:						
Charitable activities						
Support for members and promotion of membership of the Institute		3,172	231	148	3,551	4,920
Promotion of spatial planning		2,656	44	145	2,845	2,500
Planning Aid		245	–	6	251	242
Total expenditure		6,073	275	299	6,647	7,662
Net income/(expenditure) before investment gains		183	(275)	23	(69)	26
Net gains on investment assets		147	–	1	148	277
Net income/(expenditure)		330	(275)	24	79	303
Transfers between funds	13	(238)	238	–	–	–
Net movement in funds		92	(37)	24	79	303
Reconciliation of funds						
Fund balances at 1 January		7,926	2,133	559	10,618	10,315
Fund balances at 31 December		8,018	2,096	583	10,697	10,618

THE ROYAL TOWN PLANNING INSTITUTE

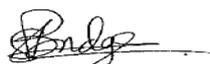
CHARITY AND CONSOLIDATED BALANCE SHEETS

AS AT 31 DECEMBER 2020

	Notes	Charity		Consolidated	
		2020 £'000	2019 £'000	2020 £'000	2019 £'000
Fixed assets:					
Tangible fixed assets	9	1,370	1,437	1,370	1,437
Investments	10	<u>2,211</u>	<u>2,063</u>	<u>2,210</u>	<u>2,063</u>
Total fixed assets		<u>3,581</u>	<u>3,500</u>	<u>3,580</u>	<u>3,500</u>
Current assets:					
Debtors	11	301	3,158	301	3,158
Short term deposits		2,760	2,756	2,760	2,756
Cash at bank and in hand		<u>6,282</u>	<u>3,581</u>	<u>6,291</u>	<u>3,590</u>
Total current assets		<u>9,343</u>	<u>9,495</u>	<u>9,352</u>	<u>9,504</u>
Liabilities:					
Creditors: Amounts falling due within one year	12	<u>2,227</u>	<u>2,377</u>	<u>2,225</u>	<u>2,377</u>
Net current assets		<u>7,116</u>	<u>7,118</u>	<u>7,127</u>	<u>7,127</u>
Total assets less current liabilities		<u>10,697</u>	<u>10,618</u>	<u>10,707</u>	<u>10,627</u>
Total Net Assets		<u>10,697</u>	<u>10,618</u>	<u>10,707</u>	<u>10,627</u>
The funds of the charity					
General		8,018	7,926	8,028	7,935
Designated	13	2,096	2,133	2,096	2,133
Restricted	13	<u>583</u>	<u>559</u>	<u>583</u>	<u>559</u>
Total charity funds		<u>10,697</u>	<u>10,618</u>	<u>10,707</u>	<u>10,627</u>

The notes on pages 43 to 63 form part of these accounts.

Approved by the Trustees on 26 May 2021 and signed on their behalf by:



Susan Bridge – Chair of the Board

THE ROYAL TOWN PLANNING INSTITUTE

CHARITY AND CONSOLIDATED STATEMENT OF CASHFLOWS

FOR THE YEAR ENDED 31 DECEMBER 2020

	Note	Charity		Consolidated	
		2020 £'000	2019 £'000	2020 £'000	2019 £'000
CASH FLOWS FROM OPERATING ACTIVITIES					
Net cash provided by/(used in) operating activities	a	2,754	181	2,754	(39)
CASH FLOWS FROM INVESTING ACTIVITIES					
Dividends, interest and rents from investments		(49)	76	(49)	76
Purchase of property plant and equipment		-	(2)	-	(2)
Purchase of investments		-	(14)	-	(14)
Net cash provided by investing activities		(49)	60	(49)	60
Change in cash and cash equivalents in the year		2,705	241	2,705	21
Cash and cash equivalents at the beginning of the year		6,337	6,096	6,346	6,325
Cash and cash equivalents at the end of the year	b	9,042	6,337	9,051	6,346

NOTES TO THE CASH FLOW STATEMENT

a		Charity		Consolidated	
		2020 £'000	2019 £'000	2020 £'000	2019 £'000
Reconciliation of net income to net cash inflow from operating activities					
	Net income before transfers	79	303	80	301
	Depreciation charges	67	82	67	82
	Gains on investments	(148)	(277)	(147)	(277)
	Dividends, interest and rents from investments	49	(76)	49	(76)
	Decrease/(increase) in debtors	2,857	(156)	2,857	(163)
	(Decrease)/increase in creditors	(150)	305	(152)	94
	Net cash provided by/(used in) operating activities	2,754	181	2,754	(39)
Analysis of cash and cash equivalents					
b		Charity		Consolidated	
		2020 £'000	2019 £'000	2020 £'000	2019 £'000
	Notice deposits (less than 3 months)	2,760	2,756	2,760	2,756
	Cash in hand	6,282	3,581	6,291	3,590
	Total cash and cash equivalents	9,042	6,337	9,051	6,346

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020

1. Structure and basis of consolidation

- a) The financial statements of The Royal Town Planning Institute ("The Institute") have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard in the UK and Republic of Ireland (FRS 102) (second edition effective 1 January 2019), the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Charities and Trustee Investment (Scotland) Act 2005, and applicable accounting standards. The financial statements are prepared under the Historical Cost convention with the exception of investments, which are included at market value.

The financial statements have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a 'true and fair view'. This departure has involved following Charity SORP (FRS 102) rather than the Charity SORP effective from 1 April 2005 which has since been withdrawn.

- b) The Royal Town Planning Institute is a public benefit entity (No 262865) as defined by FRS 102, registered as a charity in England and Wales, also a registered charity in Scotland (SC037841).
- c) RTPI Services Limited (Company No 2463662 registered in England) is the wholly owned subsidiary of The Royal Town Planning Institute and its financial statements have been consolidated, on a line-by-line basis, in the Institute's accounts. The company ceased to trade with effect from 1 January 2019. The contracts previously managed by the company were novated to the RTPI.
- d) Scottish Town Planning Institute (Company No 145741 registered in Scotland) is a wholly owned subsidiary of RTPI Services Limited. This company is limited by guarantee and was dormant for 2020 and 2019.
- e) RTPI Services ITA Limited (Company No 5018796 registered in England) is a wholly owned subsidiary of RTPI Services Limited. This company is limited by shares and was dormant in 2020 and 2019.
- f) The National Council for Housing and Planning is a separate charity (No 252002) and company limited by guarantee (Company 496385 registered in England). The Trustees of the Institute appoint the Trustees of the National Council. The charitable company was dormant in 2020 and 2019. Following the merger of its business (previously trading under the name "ROOM") with the Institute in 2002.

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

1. Structure and basis of consolidation (continued)

- g) The RTPI Trust is a benevolent fund for the benefit of planners. The Trust was established by a Trust Deed dated 25 April 1994 and is a registered charity (No 1041078). Although a majority of its Trustees are Past Presidents of the Institute, the financial statements have not been consolidated as the objects of the Trust are considered dissimilar and the governance is independent of the Institute.
- h) Planning Aid Trust, a company limited by guarantee (Company No 4259433 registered in England) is registered as a charity (No 1092185). The financial statements of Planning Aid Trust have not been consolidated, as governance of the Trust is independent of the Institute.

2. Accounting policies

- a) Income recognition
Income is included in the Statement of Financial Activities when receipt is probable, there is entitlement, and the amount can be quantified with reasonable accuracy. Member subscriptions are recognised in the calendar year to which they relate. Amounts received in advance for future periods are deferred. Government grants are recognised using the performance model, as permitted by SORP. Where donations and grants are received for a specific purpose and their usage is restricted, they are credited to a restricted fund. Bank deposit interest is stated on a receivable basis. Investment income is recognised when receivable and the amount can be measured reliably which is usually on notification of the dividend payable.
- b) Expenditure recognition and allocation between activities
Liabilities are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Expenditure is recognised on an accruals basis and includes irrecoverable VAT. Charitable expenditure includes the direct costs of pursuing the objectives of the Institute together with an allocation of overheads. Governance costs include the direct costs of the Governance Office, an appropriate allocation of central overheads (where these relate to the strategic work of the Institute) and the direct costs of compliance with statutory requirements.
- c) Regional activities
Income and expenditure related to Regional activities are included in the financial statements within the general fund and reported as such in the Statement of Financial Activities. Prior years included Regional activities within designated funds. The regional designated funds accumulated in prior years continue to be designated for regional projects.

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

2. Accounting policies (continued)

d) Operating leases are charged to the Statement of Financial Activities over the period of the lease.

e) Taxation

The Royal Town Planning Institute is a registered charity and is therefore potentially exempt from taxation of its income and gains to the extent that they are applied for charitable purposes. No charge has arisen during the year.

f) Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Designated funds comprise unrestricted funds that have been set aside by the Trustees for particular purposes.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by the donors or which have been raised by the charity for specific purposes. Further details are given in the notes to the financial statements.

g) Tangible Fixed assets

All assets are capitalised where the useful life is expected to exceed 2 years and the cost is over £1,000. Depreciation is charged on a straight-line basis at a rate, which will write off the cost of the assets over their useful life. The depreciation rates charged are as follows:

Asset class	Depreciation rate
Freehold land	0%
Freehold property excluding land	2%
Refurbishment of freehold property	4%
Plant and machinery	10%
Office equipment and furniture	20%
Computer equipment	33.33%

h) Fixed asset investments

Investments are a form of basic financial instrument and are initially recognised at their transaction value and subsequently re-measured at their fair value as at the Balance Sheet date using the closing quoted market price. The Statement of Financial Activities includes the net gains and losses arising on revaluation and disposals throughout the year.

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

2. Accounting policies (continued)

i) Debtors

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

j) Cash at bank and in hand

Cash at bank and in hand includes cash and short-term highly liquid investments with a short maturity of three months or less from the date of acquisition or opening of the deposit or similar account.

k) Creditors and provisions

Creditors and provisions are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

l) Pension costs

Details of the RTPI pension schemes are given below:

Defined Benefit Scheme – RTPI exited the West Sussex local government pension scheme on 30 September 2018.

Defined Contribution Scheme – From 1 October 2018, there is one pension scheme for all staff.

Pension salary sacrifice – From 1 September 2018, RTPI introduced a salary sacrifice offer for all staff in the Defined Contribution Scheme.

Pension costs charged in the financial statements represent contributions payable by the Institute during the year.

m) Critical accounting estimates and assumptions

Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances.

The RTPI makes estimates and assumptions concerning the future. The resulting accounting estimates and assumptions will, by definition, seldom equal the related actual results.

n) Financial instruments

The charity only has financial assets and liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are recognised initially at transaction value and subsequently measured at their settlement value.

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

2. Accounting policies (continued)

- o) Preparation of the accounts on a going concern basis.

The Trustees have reviewed and will continue to review the impact of the COVID-19 Pandemic on the Institute's cash flow and future liquidity. They are currently satisfied that cash flow remains strong, the budgets for 2021 include the expected reduction in non-subscription to continue and a breakeven budget has been prepared. Membership income for 2021 is expected to be higher than the prudent budget prepared. There are no immediate concerns with regard to the future of the institute for the next 12 – 18 months and on this basis, the Institute is a going concern.

3. Government grants

Included within income from Grants and Sponsorship and Supporting Members is government grants totalling £299k (2019: £50k) to support various projects including the MHCLG Future Planners Funds (£115k) and the Scottish Government Digital Planning (£96k). There were no unfulfilled conditions in relation to government grants at the year end.

4. Investment income

	2020	2019
	£'000	£'000
Interest receivable on short term deposits	7	11
Investment income receivable	42	65
Total investment income	49	76

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

5. Analysis of expenditure on charitable activities

	People related costs £'000	Other costs £'000	Total 2020 £'000	Total 2019 £'000
Charitable expenditure				
Support for members and promotion of membership of the Institute				
Direct costs	1,708	764	2,472	3,813
Governance Costs	5	28	33	89
Allocation of overheads	564	480	1,044	1,020
	2,277	1,272	3,549	4,922
Promotion of spatial planning				
Direct costs	943	1,153	2,096	1,747
Governance Costs	3	20	23	60
Allocation of overheads	392	334	726	693
	1,338	1,507	2,845	2,500
Planning Aid				
Direct costs	118	40	158	123
Governance Costs	–	2	3	10
Allocation of overheads	49	42	91	109
	167	84	251	242
Total charitable expenditure	3,782	2,863	6,645	7,664

People related costs include all the costs of recruitment, employment and training of members of staff employed by the Institute. The allocation here relates to people related costs of members of staff in central services undertaking their trustee duties, and costs associated with their meetings. Governance "other" costs represent the audit fees, expenses of the trustees in undertaking their trustee duties, and costs associated with their meetings. Overheads of the central services and registered office are allocated based on staff numbers who work at the registered office.

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

5. Analysis of expenditure on charitable activities (continued)

Prior Year Comparatives	People related costs £'000	Other costs £'000	Total 2019 £'000
Charitable expenditure			
Support for members and promotion of membership of the Institute			
Direct costs	1,713	2,100	3,813
Governance Costs	43	45	89
Allocation of overheads	490	531	1,020
	2,246	2,676	4,922
Promotion of spatial planning			
Direct costs	999	748	1,747
Governance Costs	30	30	60
Allocation of overheads	333	360	693
	1,362	1,138	2,500
Planning Aid			
Direct costs	117	6	123
Governance Costs	5	5	10
Allocation of overheads	53	57	109
	174	68	242
	3,783	3,881	7,664
Total charitable expenditure			

Allocation of overheads under "other costs" above comprise:

	2020 £'000	2019 £'000
Premises related costs	156	170
Office services	427	483
Legal and professional fees (excluding audit)	59	99
Irrecoverable VAT	214	196
Allocated overheads – total	856	948

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

6. Analysis of staff costs and the cost of key management personnel

	2020	2019
	£'000	£'000
Wages and salaries	2,760	2,726
Pension costs	491	469
Social security costs	280	272
	3,531	3,467
Agency staff	122	49
	3,653	3,516

Wages and Salaries includes redundancy and termination payments of £36k (2019 £nil).

	2020	2019
Average number of staff employed		
Support for members and promotion of membership of the Institute	46	48
Promotion of spatial planning	32	32
Planning Aid	4	5
Governance	2	2
	84	87

The number of staff whose emoluments, including taxable benefits but excluding pension contributions from The Royal Town Planning Institute, exceeded £60,000 was:

	No of employees	No of employees
Earnings band	2020	2019
£60,000 to £69,999	4	5
£70,000 to £79,999	1	2
£110,000 to £119,999	1	-
£130,000 to £139,999	1	1
	7	8

Pension contributions made during the year for these employees were £80k (2019: £75k).

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

6. Analysis of staff costs and the cost of key management personnel (continued)

The key management personnel of the parent charity and the group comprise the trustees, the Chief Executive Officer, the Director of Corporate and Commercial Services, the Finance Director, The Director of Scotland & Ireland and the Director of Wales & Northern Ireland. The total employee benefits of the key management personnel were £604k (2019: £507k).

7. Related Party Transactions

Transactions with Trustees and Connected Persons

- a) No payments are made to Trustees in respect of their time spent on trustee activities or to compensate for loss of earnings. The Trustees only receive reimbursement for expenses actually incurred in attending meetings. During the year 16 trustees were reimbursed £1k including payments to travel agents (2019: 16 trustees were reimbursed £32k including payments to travel agents) in respect of expenses actually incurred.
- b) The Royal Charter and Byelaws do allow APC assessors who are Trustees to be paid for time incurred on examinations. No Trustees received such payments in the year (2019: one Trustee was paid £220).

RTPI Trust

RTPI received £8k from RTPI Trust for bursaries in the year (2019: £8k).

At the year end £8k was due from RTPI Trust and is included within other debtors (2019: £nil) and £4k was due to the Trust (2019: £5k).

RTPI Services Ltd

Details of the transactions and balances with RTPI Services Ltd are shown in note 14.

There were no other related party transactions during the year (2019: none).

8. Remuneration of Auditor

The audit fees for the Institute were £13k during 2020 (2019: £12k).

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

9. Tangible fixed assets – Charity and group

	41 Botolph Lane		Office Equipment & Furniture	
	Freehold land	Refurbishment & plant	& Furniture	Total
	£'000	£'000	£'000	£'000
Cost				
At 1 January 2020	300	2,351	117	2,768
Additions and disposals	–	–	–	–
At 31 December 2020	300	2,351	117	2,768
Depreciation				
At 1 January 2020	–	(1,241)	(90)	(1,331)
Charge for the year	–	(56)	(11)	(67)
Disposals	–	–	–	–
At 31 December 2020	–	(1,297)	(101)	(1,398)
Net Book Value				
At 31 December 2020	300	1,054	16	1,370
At 31 December 2019	300	1,110	27	1,437

10. Investments

	2020	2019
	£'000	£'000
Group		
Market value of listed investments at 1 January	2,063	1,772
Acquisitions at cost	–	14
Gains on investments	147	277
Market value of investments at 31 December (consolidated accounts)	2,210	2,063
Historical cost as at 31 December	1,411	1,411

Material investments within the portfolio as at 31 December 2020 include:

CCLA COIF Charities investment fund £1,388k (63%); and
Barclays Wealth Global Markets investment fund £780k (35%).

Charity

In addition to the above, the charity's balance sheet includes an investment at 31 December 2020 and 2019 of £1k in RTPi Services Limited (cost £1k) (see note 15).

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

11. Debtors

	Charity		Consolidated	
	2020	2019	2020	2019
	£'000	£'000	£'000	£'000
Prepayments	158	172	158	172
Other debtors	143	2,986	143	2,986
	<u>301</u>	<u>3,158</u>	<u>301</u>	<u>3,158</u>

12. Creditors: amounts falling due within one year

	Charity		Consolidated	
	2020	2019	2020	2019
	£'000	£'000	£'000	£'000
Receipts in advance	1,865	2,195	1,865	2,195
Other taxes and social security costs	40	–	40	–
Other creditors and accruals	320	182	320	182
Amounts due to subsidiary	2	–	–	–
	<u>2,227</u>	<u>2,377</u>	<u>2,225</u>	<u>2,377</u>

Receipts in advance b/f: £2,195k
Amounts recognised in the year: £2,195k

Income deferred in the year: £1,865k
Receipts in advance c/f: £1,865k

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

13. Outline summary of fund movements

Designated Funds

	Fund balances brought forward 1 January 2020 £'000	Income £'000	Expenditure £'000	Transfers £'000	Fund balances carried forward 31 December 2020 £'000
Tangible fixed assets	1,435	–	–	(65)	1,370
Property and maintenance	189	–	–	–	189
Research	183	–	(59)	–	124
ICT development	66	–	(66)	–	–
Education Research	8	–	(12)	12	8
Regions	252	–	–	–	252
COVID-19	–	–	(48)	48	–
Corporate Strategy Implementation Plan	–	–	(67)	170	103
Digital Transformation	–	–	(23)	73	50
	2,133	–	(275)	238	2,096

Prior Year Comparatives

	Fund balances brought forward 1 January 2019 £'000	Income £'000	Expenditure £'000	Transfers £'000	Fund balances carried forward 31 December 2019 £'000
Tangible fixed assets	1,517	–	–	(82)	1,435
Property and maintenance	239	–	(50)	–	189
Research	231	19	(67)	–	183
ICT development	231	–	(250)	85	66
Great North Plan	18	–	(18)	–	–
Education Research	8	–	–	–	8
Regions	235	17	–	–	252
	2,479	36	(385)	3	2,133

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

13. Outline summary of fund movements (continued)

Designated Funds (continued)

Tangible fixed assets

The Trustees have decided to create a designated reserve equal to the net book value of tangible fixed assets not allocated to restricted funds or another designated fund, which represents assets in use for charitable purposes. During 2020, this fund has been reduced in line with the depreciation charge for the year to ensure the fund matches the net book value of fixed assets.

Property and maintenance

This fund has been created by the Trustees in order to fund major repairs to Botolph Lane and related plant and equipment as well as potentially acquiring new premises or facilitating the sale of existing freehold or leasehold properties in the medium term.

Research

During 2018, the Trustees allocated funds for the RTPI research programme for 2019-2021. The purpose of the Research Fund is to manage the delivery of RTPI's research programme and matched funding where appropriate. £59k of research expenditure was charged to the fund during the year.

Information and communications technology development (ICT Development)

The Trustees have created a designated fund to support the Institute in developing its systems capability, and to ensure that the information and communications infrastructure remain up to date and fit for purpose. A major investment in IT infrastructure was approved in 2015 which concluded in 2020, the funds having been spent.

Regions

These reserves were accumulated under the previous regional funding arrangements, which ended in January 2018. Due to the cessation of all events during 2020, no such use of the funds was made in the current year, but once normal activities are able to be resumed the funds will begin to be drawn down again.

COVID-19

A fund was set up to enable up to £50k to be spent on hardware, software and subscriptions to ensure a smooth and complete transition to home working could be achieved during the pandemic. A total of £48k was spent in 2020.

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

13. Outline summary of fund movements (continued)

Designated Funds (continued)

Corporate Strategy Implementation Plan

This fund was set up in 2020 to realise the content of the Corporate Strategy adopted by the Institute in 2019. A total of £170k was put into the fund in 2020 of which £67k was spent.

Digital Transformation

This fund represents the next phase in the Institute's investment in its online presence and IT systems. £73k was added to the fund in 2020, of which £23k was spent.

Restricted Funds

	Fund balances brought forward 1 January 2020 £'000	Income £'000	Expenditure £'000	Gains/ (losses) £'000	Fund balances carried forward 31 December 2020 £'000
George Pepler International	53	–	(2)	–	51
Lichfield Memorial Lecture	14	–	–	1	15
Peter Suttie Award	7	–	–	–	7
Future Planners' Bursary Fund	34	–	–	–	34
MHCLG Future Planners Fund 2017/18	28	–	–	–	28
MHCLG Future Planners Fund 2018/19	52	–	(23)	–	29
MHCLG Future Planners Fund 2019/20	–	115	(77)	–	38
Scottish Government Bursary Fund	48	–	(10)	–	38
Northern Ireland Government Bursary Fund	–	4	(4)	–	–
Practitioner Research Fund	137	–	–	–	137
Value of Planning in Wales	1	–	–	–	1
Planning Enforcement Fund	31	–	(22)	–	9
Wales Training to LPA's	1	–	–	–	1
Measuring Planning Outcomes National Planning Framework 4 Engagement	–	65	(65)	–	–
Scottish Government Digital Planning	–	34	(10)	–	24
RTPI Trust Diversity Bursaries	–	96	(72)	–	24
	–	8	(8)	–	–
Planning Aid					
Grants and Donations	115	–	–	–	115
West Midlands Planning Aid	31	–	(6)	–	25
Gypsy and Traveller Training	7	–	–	–	7
	559	322	(299)	1	583

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

13. Outline summary of fund movements (continued)

Restricted Funds (continued)

Prior Year Comparatives

	Fund balances brought forward 1 January 2019 £'000	Income £'000	Expenditure £'000	Gains/ (losses) £'000	Fund balances carried forward 31 December 2019 £'000
George Pepler International	55	–	(2)	–	53
Lichfield Memorial Lecture	18	2	(7)	1	14
Peter Suttie Award	7	–	–	–	7
Future Planners' Bursary Fund	35	–	(1)	–	34
RTPI Trust Diversity Bursary Fund	–	8	(8)	–	–
MHCLG Future Planners Fund 2017/18	46	–	(18)	–	28
MHCLG Future Planners Fund 2018/19	115	–	(63)	–	52
Scottish Government Bursary Fund	55	–	(7)	–	48
Northern Ireland Government Bursary Fund	–	4	(4)	–	–
Practitioner Research Fund	147	–	(10)	–	137
Value of Planning in Wales	1	–	–	–	1
Planning Enforcement Fund	–	31	–	–	31
Wales Training to LPA's	1	–	–	–	1
Planning Aid					
Grants and Donations	117	–	(2)	–	115
West Midlands Planning Aid	31	–	–	–	31
Gypsy and Traveller Training	7	–	–	–	7
	635	45	(122)	1	559

The Institute has received the income shown above, which is restricted to the purposes for which it has been received.

The projects are:

George Pepler International Award

This biennial award is made to anyone their first 10 years of post-qualification planning experience who wishes to visit another country to that of their residence for a short period in order to study some particular aspect of town and country planning. The Award was established by Sir George Pepler, one of the founder members of the RTPI, and offered for the first time in 1973.

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

13. Outline summary of fund movements (continued)

Restricted Funds (continued)

Lichfield Memorial Lecture

In 2011, the Institute received a grant from Dalia Lichfield to fund a series of annual lectures in memorial of Professor Nathaniel Lichfield. The first lecture was held in October 2011.

Peter Suttie Award

This award is organised by the Scottish Young Planners' Network and supported by RTPi Scotland, Heads of Planning Scotland and the Aberdeenshire Council. It is awarded to young planners to undertake a comparative study into planning issues. It was first awarded in July 2013.

Future Planners Bursary Fund

A restricted fund established during 2015 with the purpose of increasing the number of students choosing to study Planning at Master's degree level. During 2018, MHCLG approved a three-year grant award to fund enhanced bursaries for a period of three years. In accordance with the funding agreement, restricted funds have been created to manage the three years funding programme of bursary awards.

MHCLG Future Planners Funds

Bursary awards from this fund are restricted to Planning students at English Universities.

RTPi Future Planners Bursaries (Scotland)

A restricted fund initially established from monies received to hold a regeneration conference in Scotland, which was later cancelled. The Scottish Government have approved a funding to proposal to re-purpose this fund for three year programme of bursary awards at Scottish Universities. The first awards were during 2019.

Northern Ireland Government Bursary Fund

A restricted fund established to manage the funding The Northern Ireland Government have provided to make bursary awards at Northern Ireland Universities. The first awards were made during 2019.

Practitioner Research Fund

A restricted fund set up in 2017 to manage the fund established by the closure of the Town and Country Planning Summer School (TCPSS). The fund will be used to make a biennial research award.

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

13. Outline summary of fund movements (continued)

Restricted Funds (continued)

The Planning Enforcement Fund

A restricted grant from MHCLG to update the Planning Enforcement Handbook. The funding was received in 2019 and the work has been largely completed during 2020.

Planning Aid Grants and Donations

This fund includes the balance of DCLG grants and donations for Planning Aid activities received prior to April 2013.

West Midlands Planning Aid Service

Donations received in the West Midlands specifically for the furtherance of the Planning Aid programme. No expenditure was incurred in 2020; a review of the monies held in the restricted and the appropriate use of the remaining funds is ongoing.

Gypsy and Traveller Training

No expenditure was incurred in 2020, but funds are being held against future training activities in the context of current and emerging legislation.

Scottish Government Digital Planning

This fund was granted during 2020 for the production of a report into the business case for a digital transformation of the Scottish planning system.

Measuring Planning outcomes

This was granted in 2020 for research into formulating an outcomes-based approach to the management of the planning process to be used as a tool to assess local and national performance.

National Planning Framework 4 Engagement

These funds were granted in 2020 to assist on the Scottish Government's National Planning Framework 4 initiative.

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

14. Analysis of group net assets between funds

	General Fund £'000	Designated Funds £'000	Restricted Funds £'000	Total £'000
Tangible fixed assets	–	1,370	–	1,370
Listed investments	2,189	–	21	2,210
Current assets	8,064	726	562	9,352
Current liabilities	(2,225)	–	–	(2,225)
Net assets	8,028	2,096	593	10,707

Prior Year Comparatives

	General Fund £'000	Designated Funds £'000	Restricted Funds £'000	Total £'000
Tangible fixed assets	–	1,437	–	1,437
Listed investments	2,043	–	20	2,063
Current assets	8,269	696	539	9,504
Current liabilities	(2,377)	–	–	(2,377)
Net assets	7,935	2,133	559	10,627

15. Investment in subsidiary company

The Institute holds 100% of the issued share capital of RTPi Services Limited (RSL), a company registered in England, whose primary activities are to provide conferences and publications.

The registered address and place of business is 41 Botolph Lane, London EC3R 8DL. The company ceased to trade on 1 January 2019.

At 31 December 2020 RSL had debtors of £2k (2019: £2k) and cash at bank of £9k (2019: £9k). Called up share capital was £1k (2019: £1k) and the profit and loss account balance was £10k (2019: £10k) giving total shareholders' funds of £11k (2019: £11k). There was no trading activity in the year (2019: none).

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

16. Operating leases

		2020		2019
Amount charged in the year		£'000		£'000
Leasehold property		32		28
Equipment		7		9
Total		39		37
Total commitment	Property	Equipment	Property	Equipment
	2020	2020	2019	2019
	£'000	£'000	£'000	£'000
Operating leases expiring within one year	24	6	34	7
Operating leases expiring between 2 and 5 years	77	6	108	7
Operating leases > 5 years	–	–	13	–
	101	12	155	14

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

17. Prior year comparatives by class of fund

CONSOLIDATED STATEMENT OF FINANCIAL ACTIVITIES (including consolidated income and expenditure accounts)

YEAR ENDED 31 DECEMBER 2019

	Notes	General Fund	Designated Funds	Restricted Funds	Total 2019
		£'000	£'000	£'000	£'000
INCOME FROM:					
Charitable activities					
Membership subscriptions and fees		5,009	–	–	5,009
Grants and Sponsorship towards the promotion of spatial planning and membership		885	19	33	937
Support for members		1,367	17	12	1,396
Planning Aid		6	–	–	6
Investments	3	76	–	–	76
Other Income		264	–	–	264
Total income		<u>7,607</u>	<u>36</u>	<u>45</u>	<u>7,688</u>
EXPENDITURE ON:					
Charitable activities					
Support for members and promotion of membership of the Institute		4,508	301	113	4,922
Promotion of spatial planning		2,409	84	7	2,500
Planning Aid		240	–	2	242
Total expenditure	5	<u>7,157</u>	<u>385</u>	<u>122</u>	<u>7,664</u>
Net income/(expenditure) before investment gains/(losses)		450	(349)	(77)	24
Net gains on investment assets		276	–	1	277
Net income/(expenditure)		726	(349)	(76)	301
Transfers between funds	13	(3)	3	–	–
Net movement in funds		723	(346)	(76)	301
Reconciliation of funds					
Fund balances at 1 January		7,212	2,479	635	10,326
Fund balances at 31 December		<u>7,935</u>	<u>2,133</u>	<u>559</u>	<u>10,627</u>

THE ROYAL TOWN PLANNING INSTITUTE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER
2020 (continued)

17. Prior year comparatives by class of fund (continued)

**CHARITY STATEMENT OF FINANCIAL
ACTIVITIES**
(including income and expenditure account)

YEAR ENDED 31 DECEMBER 2019

	General Fund	Designated Funds	Restricted Funds	Total 2019
	£'000	£'000	£'000	£'000
INCOME FROM:				
Charitable activities				
Membership subscriptions and fees	5,009	–	–	5,009
Grants and Sponsorship towards the promotion of spatial planning and membership	885	19	33	937
Support for members	1,367	17	12	1,396
Planning Aid	6	–	–	6
Investments	76	–	–	76
Other Income	264	–	–	264
Total income	7,607	36	45	7,688
EXPENDITURE				
Charitable activities				
Support for members and promotion of membership of the Institute	4,506	301	113	4,920
Promotion of spatial planning	2,409	84	7	2,500
Planning Aid	240	–	2	242
Total expenditure	7,155	385	122	7,662
Net income/(expenditure) before investment gains/(losses)	452	(349)	(77)	26
Net gains on investment assets	276	–	1	277
Net income/(expenditure)	728	(349)	(76)	303
Transfers between funds	(3)	3	–	–
Net movement in funds	725	(346)	(76)	303
Reconciliation of funds				
Fund balances at 1 January	7,201	2,479	635	10,315
Fund balances at 31 December	7,926	2,133	559	10,618