

Annual Report and Accounts

The Royal Town Planning Institute | 31 December 2022



Inside this report

The Royal Town Planning Institute Annual Report

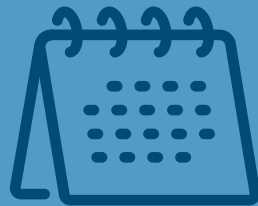
2	Contents	49	Charity Statement of Financial Activities
4 - 5	Chair's Foreword	50	Charity and Consolidated Balance Sheets
6 - 42	Annual Report of the Trustees	51	Charity and Consolidated Statement of Cash Flows
43 - 47	Independent Auditor's Report	52 - 71	Notes to the financial statements
48	Consolidated Statement of Financial Activities		

An overview

The key stats you need to know this year

27,143 members

342



events, online CPD, apprentices
finished and conferences held



45 policy
responses to
government



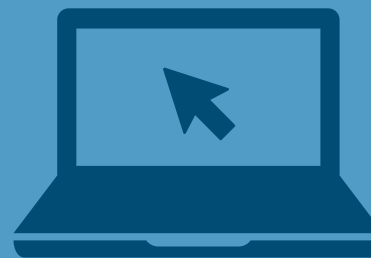
15,146
Chartered members

3,390

Licentiate members
up 24%



70%
Conversion
from student
up 24%



120,000
unique website hits
Planning Aid England

Foreword to the Royal Town Planning Institute Annual Report 2022

Chair of the Board of Trustees 2022, Susan Bridge FRTPI

It is an honour to have been chair of the RTPI Trustee Board and I am committed, in my new role of President, to representing the best the profession has to offer during my year in the role. However, as we reflect on 2022 there are some issues that came into sharp focus, which we are now working hard to address.

The extent to which resourcing in the public sector had declined became clear. As part of the launch of the  **Planning Agencies** report we identified that since 2009 **net expenditure on planning in local authorities had declined by 43%**. Work by RTPI Cymru commissioned by the Welsh Government also shone a light on the conditions under which our members were working with the  **Big Conversation** showing that as many as **75% of planners are overstretched**. This is why I have chosen to focus on the welfare of our

members in 2023, to provide them with the support they need and make a consistent argument for the resourcing of planning authorities throughout the UK.

The picture in the UK may be challenging and we are doing everything we can to alleviate that, but it is important not to lose sight of the international scope that town planning has. **We have members in more than 80 different countries making a positive difference** to the communities within which they work.


This international element of the RTPI is not greatly understood, nor is the export value our profession has for the UK economy. That is why throughout 2022 we launched two editions of  **Planning is Global**, a publication that highlights the projects around the world that our members work on and a  **second edition**



which focused on the planners themselves and the opportunities for a global impact the RTPI membership offers.


I was able to see this first hand during an RTPI visit to Dubai, where we were able to explore not only the possible future relationships in the region but also the World Expo site, which will be host to COP 28 this year.

We were also able to send a delegation to Poland for the World Urban Forum (WUF). The theme of the year was the impact that rapid urbanisation is having on communities around the world. This gave our organisation a great deal to discuss and to help present the important role that planning has in alleviating these pressures and ensuring that people around the world can benefit from a well-planned and considered built environment.

The result of our attendance of WUF was to join with our sister institutes around the world as part of the Global Planners Network and sign the  **Katowice Declaration**; a sustained commitment from the global planning profession and academia to implement the agenda from WUF.

Closer to home we have been working hard to influence policy and legislation across the nations of the UK and Ireland. Alongside the Big Conversation work in Wales our team in Scotland undertook work influencing the 4th National Planning Framework in Scotland through engagement with Ministers, officials and MSPs whilst a business case was submitted to Scottish Government for a planning apprenticeship. In Ireland we were part of the Planning Advisory Forum set up by the government to engage with key stakeholders in advance of the publication of the new Planning and Development Bill. While in Northern Ireland the team continued to work to promote the value of planning in Northern Ireland and published asks following the Stormont elections in May. We are also supporting work to take forward recommendations following the Audit NI and Public Accounts Committee reports published in 2022 to improve planning services.

Our commitment to ensuring that our profession is dedicated to tackling global challenges was supported by the formal launch of

 **Planning For Tomorrow's Environment** on World Town Planning Day on 8 November 2022.

This project which we delivered in partnership with **Content With Purpose** showcases the positive impacts that planning has in tackling the climate crisis through a series of films and podcasts. It is a rich resource that helps to demystify the profession, illustrate the value our members bring to society and the power they have to change the world for the better.

The report that follows is a snapshot of the work the Institute does on behalf of its members as well as the financial position we are in.

Susan Bridge

Annual report of the Trustees

For the year ended 31 December 2022

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 2022. 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.

Commentary from the Chief Executive

Victoria Hills FICE, MRTPI

I am delighted to present to you the annual report for the Royal Town Planning Institute (RTPI) for 2022. This report includes highlights some of the RTPI's activities and projects completed during the year and it's my privilege to reflect on those which are particularly important.


Without doubt one of our most significant projects throughout the year was the **retrofitting of our London office at Botolph Lane**. The pandemic made us take a fresh look at the building and the conditions staff were working in. It became quickly apparent that the Victorian warehouse, converted in the 1970s and last refurbished in the 1990s was no longer fit for purpose and needed some close attention.

With the support of the Trustees we were able to completely retrofit the building and provide a safe, comfortable and appealing workspace for staff and make space for a new members' drop-in lounge, benefitting all members, regardless of where they live and work. Given


the corporate strategy's focus on climate action it gives me great pride to say that through the process we managed to **lift the building from an unratable Energy Performance Certificate (EPC) to a B, only a couple of points away from an A**. By removing mains gas, installing a new heating, ventilation and air conditioning system and refitting all our windows **we have significantly the reduced RTPI's carbon footprint**.

Despite the intensity of work involved in retrofitting our main offices, we were still able to deliver on a range of other corporate strategy projects.


The RTPI remains committed to **Equality, Diversity and Inclusion (EDI)**. As part of this commitment we convened a range of other built environment membership bodies (CIOB, ICE, LI, RIBA and RICS) in signing a memorandum of understanding to drive forward the creation of a **more diverse, equitable and inclusive sector**. Taken together these **organisations represent 350,000 professionals**

in the built environment sector. Shortly afterwards we published an  **action plan** which focused on standardising our member data collection, understanding the transition from education into employment and raising the sector's standards of EDI knowledge, behaviours and practice.

This all falls under our **CHANGE programme**, which we launched in March 2020. Our aim is to be, and promote the planning profession to be, as diverse as the communities it represents, to act inclusively, treating everyone fairly and seeking to provide a culture which delivers the best outcomes for the diverse society in which and for whom we work.

One of our most important activities in this space was to launch  **EXPLORE** pilot in January 2022, aiming to encourage young people, particularly those from Asian, Black, minority ethnic communities and lower socio-economic backgrounds, to become planners.

In the first year, we gave school pupils 16-18 years old the chance to explore the many rewarding roles and opportunities that the town planning profession can offer. By August 2022, 80 students had been placed and results after completing the programme showed that those who would consider a career in planning increased significantly to 92% from just 38% at the start of the programme.

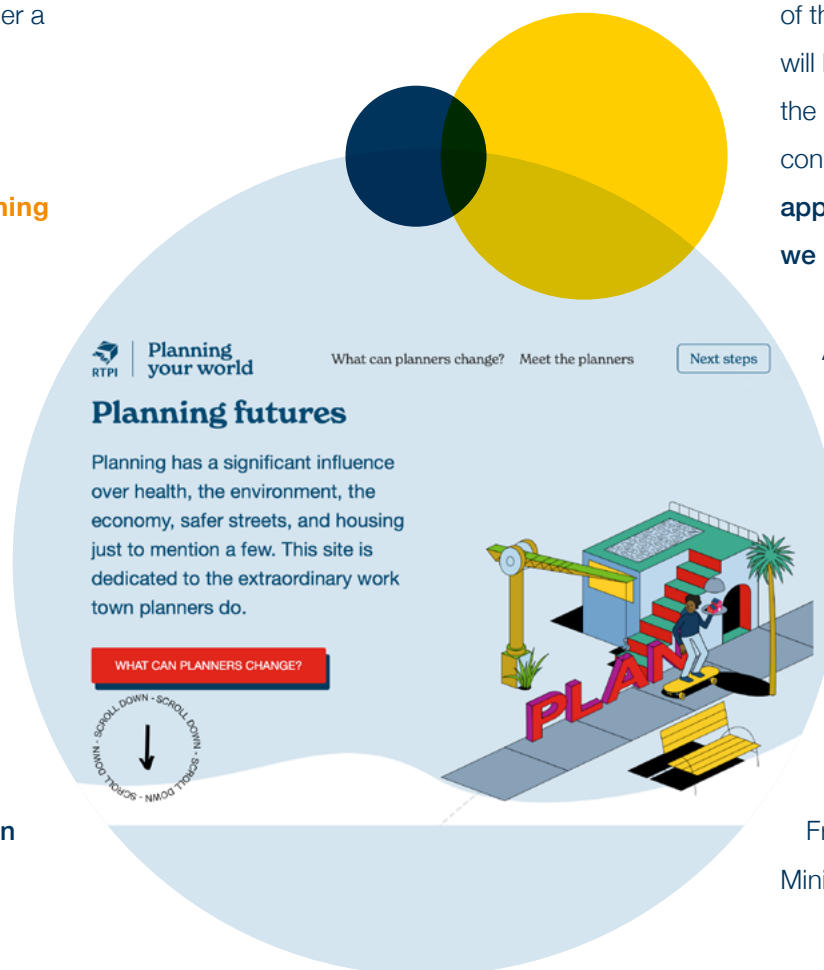
We also launched our new online platform  **Planning Your World** which is designed to help the public understand the breadth and depth of the positive impacts planning has on society and provide an inspiration platform for those considering pursuing it as a career. By focusing on the positive outcomes planners can have on their community we hope to demystify the profession. So far as many as 25,000 individuals have visited the site.

I am equally proud to say that our apprenticeship programme is beginning to have an impact. We celebrated the first chartered town planners to go through the system in 2022 and now have more than 500 apprentices working towards their end point

assessment. The route into a career in planning is set to continue to grow, and we'll continue to dedicate resources to working with academia and employers to help realise its enormous potential.

In 2022 we started a much-needed review of our membership proposition in order to ensure that the benefits of membership will continue to meet the needs of our members both now and well into the future. The outputs of this work together with a complete review of the Institute's brand strategy also started in 2022, will be implemented in the year ahead. We also took the opportunity in 2022 to assess whether our code of conduct was up to date. This resulted in the **Trustees approving a revised code in December 2022, which we have now launched.**

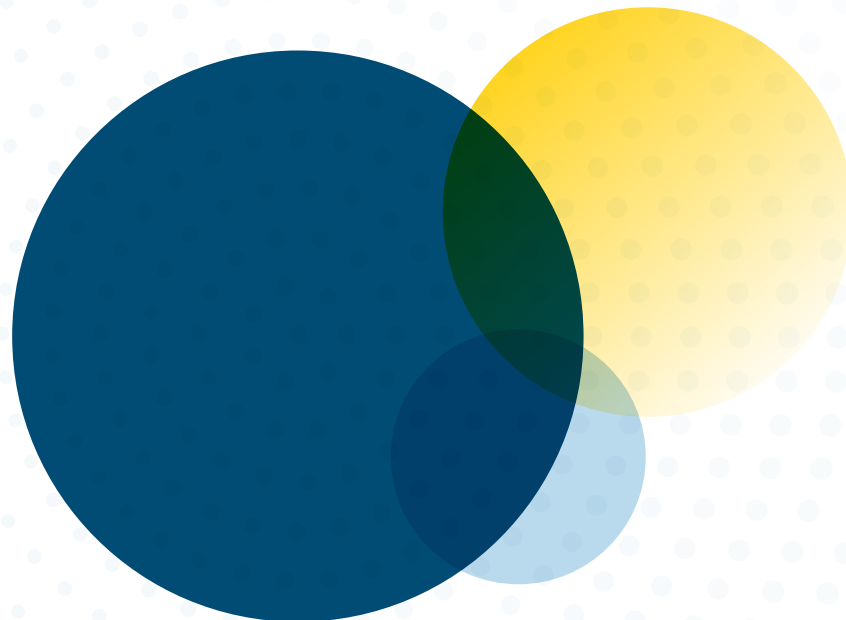
All of these activities have been undertaken against the backdrop of reforms to the planning systems being driven by Governments across the UK and Ireland. **The Levelling Up and Regeneration Bill in England has a focus on planning** and as such we have been working hard to shape it as much as we can with legislators and civil servants alike. In **Scotland** we engaged with the Scottish Government and the Scottish Parliament as part of the adoption of the 4th National Planning Framework, in **Wales** we have responded to the Minister for Climate Change to explore the impact of



a lack of resources on the well-being of the profession and **Northern Ireland** work continues on supporting work to improve the planning system following the significant changes introduced in 2015 and in Ireland we have put forward views to the Minister on our priorities for the new Planning and Development Bill.

Overall, 2022 was a year during which we continued to deliver activities against our corporate strategy and support our members. I remain hugely optimistic about the planning profession and its key role in delivering against multiple priorities including the Sustainable Development Goals. As ever, our volunteering members have continued to play a key role in the success of our shared ambitions, and to that I remain truly grateful.

Victoria Hills



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.

Our corporate strategy runs from 2020 to 2030.

The strategy has four priority areas or “pillars” which support our core objectives.

The Four Pillars are:

PILLAR ONE	PILLAR TWO	PILLAR THREE	PILLAR FOUR
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 therefore actions in response to this sit across all pillars of the strategy.

The four pillars are held up by TEN FOUNDATIONS:

1. Member Services;
2. Nations and Regions;
3. International Strategy;
4. Research and Policy;
5. Brand;
6. Diversifying Sources of Income;
7. Professional Volunteering;
8. Governance;
9. the Right Home for the RTPi;
10. and Business Planning.

Further details on our 2020-30 strategy can be found on our website at:

 www.rtpi.org.uk/news/our-strategic-priorities

Achievements and Performance

Support for Members and Promotion of Membership of the Institute – covering **PILLAR ONE**

27,143 members

15,146
Chartered members



70%
Conversion
from student
up **24%**

96%
paying members
retention



3,390
Licentiate members
up **24%**



Increase in APC
application **9%**

Membership

Following a steady **6%** growth between 2020 and 2021, overall membership numbers were maintained in 2022, with the total number of members being **27,143** at the end of 2022.

The main growth area in membership in 2022 has been in the pipeline class – Licentiates – representing an increase of **8.5%**. Growth amongst those at an early stage in their

career represents an important increase in the pipeline of planners to ensure a sustainable future for the Institute. 2022 saw a new generation take the planning pathway with the first cohort of Chartered Town Planner Degree Apprentices successfully completing their Apprenticeship in 2022 and becoming Chartered.

Key points for 2022 were:

- Over **1%** growth in paying members;
- **3.7%** growth in annual membership subscription income;

- **96%** of paying members renewed their membership;
- Overall membership retention remained high at over **92%**;
- The conversion rate from free Students to Licentiate achieved a record high of **70%**, an increase of almost **24%** in the number of conversions compared to 2021; and
- Demand for Chartered membership increased with a **9%** increase in first-time Assessment of Professional Competence (APC) applications.

Promoting the value of membership and professionalism

PILLAR ONE

GROWPLAN:

A key part of the corporate strategy is **GROWPLAN** which is a comprehensive ten-year membership growth and support strategy setting out an ambitious programme of activity to realise our growth target. **An implementation plan was developed in 2021 and during 2022 key foundation projects were implemented to ensure the appropriate operating model was in place** to deliver growth; digital transformation projects were started to streamline processes for our members; and a member value project launched.


Member Value Project:

The project was launched in 2022 and **phases one and two were completed**. A top-level overview was undertaken to explore the value members currently receive in return for annual membership, along with establishing Member Value Drivers through interviews and workshops with members. **A recommendation report provides a clear roadmap to optimise member value** and set the strategic direction for member benefits and services now and in the future. **Phase three of the project will be undertaken in 2023**.

NURTURE:

The first cohort on **our pilot mid-career mentoring programme NURTURE ended their formal mentoring session in February 2022**. The pilot was evaluated and following a successful first year, the pilot will be continued for a second cohort starting early in 2023. The scheme is designed specifically for RTPI Chartered members in the UK and Ireland who are at a mid-career point and looking to advance in their career and be successful in a senior role.

The Big Conversation

 **The Big Conversation** was focused on looking at the well-being of those working in and delivering the planning system in Wales. Our **survey received 209 responses** from members and non-members with **15%** of members in Wales responding.

The Big Conversation found high levels of planners being overstretched in their work and this was having an impact on their well-being. **61%** of all respondents reported being overstretched at least several times a week, **74%** of LPA officers felt overstretched; a staggering **21%** of all respondents felt they were overstretched all of the time.


Education and Professional Development

342 
**events, online CPD, apprentices
finished and conferences held**

 **32**
**Accredited
Planning Schools**


 **The first 18**
**apprentices finished
the programme**

Accreditation services

The Partnership Board meeting cycle – part of the annual process of quality assurance and support to the  **32 RTPI-accredited Planning Schools** – took place again in 2022, ensuring university courses are delivered effectively.

An Education Policy Review began in 2022, with the team undertaking a research and data collection phase, and developing proposals for change, following significant engagement with a range of stakeholders.

Future planner pipeline

Another 42 students received the  **RTPI Future Planners Bursary**, co-funded by the Department for Levelling Up, Housing and Communities in England. It sought to encourage graduates from a variety of related undergraduate disciplines and underrepresented backgrounds to convert to planning and study a fully accredited Master's degree.

Four undergraduate planners received the



RTPI Trust Bursary – which aims to highlight and celebrate diversity and excellence.

The first 18 apprentices officially completed the



Chartered Town Planner Degree Apprenticeship

and there are now 550 apprentices on the programme. It is delivered by eleven accredited Planning Schools in England.

Continuous Professional Development (CPD)

We developed the 'CPD Hours' policy, which will see a certain number of hours linked to an RTPI CPD event or product. The development of this and other enhancements to CPD policies and processes will continue in 2023 and beyond.

Code of Conduct

The full membership was consulted in Summer 2022 on proposed changes to the Code of Professional Conduct and all comments have been taken into account and further amendments have been made where needed. RTPI members will need to comply with the new Code from 1 February 2023.

The key changes to the Code are:

- A clearer requirement not to offer or accept bribes;
- A clearer requirement to apply reasonable standards of skill, knowledge and care to all work undertake;
- A clearer requirement to comply with CPD requirements;
- A requirement to base professional advice on appropriate evidence and without improper manipulation;
- A requirement to hold client money safely;
- Embedding the existing supplementary regulations on advertising and the use of the logo within the Code; and
- Updated equality requirements.

The new code can be found at

www.rtpi.org.uk/membership/professional-standards



EVENTS FOR MEMBERS

ACROSS THE REGIONS AND NATIONS

Project One Institute - which sets out our commitment to developing and delivering the RTPI's member services in a coordinated way was set out in a new Charter.

Our **Chief Planners of Tomorrow** initiative relaunched in 2022 with a new post-COVID model of blended learning. More than 50 Young Planners participated in virtual or in person sessions hosted by Chief Planners. The programme now offers a dedicated series of leadership sessions.

We celebrated newly Chartered Members at three pilot events across the regions and nations. One of which was in October 2022, with the **first Annual Lunch** in Wales which incorporated a Welcome Event to celebrate the newly Chartered Members in Wales and announced the **winners of the RTPI Cymru Academic Excellence Prizes** at Cardiff University.

Plans are underway to extend the pilot across the regions and nations in 2023.

We held **342 events** (CPD, Social & Networking, Awards) which included **more than 120 webinars** – all free to members. Environmental topics were the most well attended with the most popular webinar of the year being on the Environment Bill, with **more than 500 attendees**.

The Nathaniel Lichfield Lecture on Community Led Planning – *Planning's Uneasy Relationship with Localism* also attracted **more than 500 registrations**.

SCOTLAND:

Almost 400 people attended the three national events held by RTPI Scotland including the Scottish Young Planners' Annual Conference held in Perth, the Sir Patrick Geddes Commemorative Lecture given by Susan Murray, Director of the David Hume Institute, and, the RTPI Scotland Annual conference in Aberdeen on Planning for Net Zero. In total 45 events were organised by the RTPI Chapters, the Scottish Young Planners' Network, the International Group and RTPI Scotland office with 1,492 people attending.

WALES:

We held the Spring Conference in Deganwy on the theme of Living Locally in Rural Wales and the Wales Planning Conference in June in Cardiff on the theme of Planning for Health and Well-being.

NORTHERN IRELAND:

In September we held the Northern Ireland Annual Conference with **over 100 delegates** attending. Reflecting on the Chair's theme for the year – Delivering Climate Outcomes – the Conference was designed to provide an opportunity to reflect as a profession and

on our priorities moving forward – this was split into four Plenary Sessions. The Conference offered a day of discussion and debate on these topics to reflect on positioning the role of planning and the profession.

REPUBLIC OF IRELAND:

166 people attended the three sessions of the RTPI Ireland online annual conference which explored how to deliver more homes; how to make our homes and places sustainable; and how to build in quality design to our places. A further **155 people** attended the RTPI Ireland Open Forum webinar on the Planning Review with Minister Peter Burke.

85 people attended the RTPI Ireland Annual Planning Law Lecture given by Eamon Galligan SC and **48 people** attended the Planning Lecture given by Marie Donnelley, Chair, Climate Change Advisory Council.

PROFESSIONAL VOLUNTEERING

A  **'volunteer journey at the RTPI'** was defined in early 2022 and work continues to deliver the 12 steps identified. There is now a Volunteering Policy and Problem-Solving Procedure to support volunteer involvement. In 2022 we started work on a Volunteer Hub, which will be rolled out in 2023. 44 Volunteers attended a new Introduction to the RTPI and volunteering session which has been positively received.



Promotion of Spatial Planning

Covering PILLARS TWO AND THREE



45
policy responses
to government

Evidence/submissions
given to **18**
Government
committees



The policy practice networks and research teams worked hard throughout 2022 to keep pace with the Government's agenda on planning reform in England and on the first year of the delivery of the **RTPI Research Strategy 2022-24**. With the introduction of the **Levelling Up and Regeneration Bill in May 2022** staff began working to identify what amendments needed to be laid and what work needed to be done to help shape the Bill.

We also produced research on a variety of topics including rural planning across the UK and Ireland, a new approach to public sector planning and enforcement in England.

Political engagement on the **Levelling Up and Regeneration Bill** in England including the RTPI writing its own amendments and getting them put forward by MPs/peers. **These covered:**

- National Development Management Policies
- The role of county combined authorities
- Environmental Outcome Reports
- Virtual Planning Committees

Work also continued in the nations with RTPI Scotland submitting **17 policy responses** to Scottish Government or agencies, making **7 submissions** to Scottish Parliament committees or MSP briefings and appearing before Scottish Parliament Committees on 6 occasions.

Working with our Policy and Research Forum, RTPI Cymru responded to **12 Welsh Government consultations** on a range of topics including transport, flooding, social prescribing and second homes. We also submitted evidence to four Senedd Cymru / Welsh Parliament inquiries and responded to the Design Commission for Wales' consultation on Designing Renewables in Wales.

RTPI Northern Ireland responded to a number of policy and practice consultations, including on Housing Supply Strategy, Energy Issues paper, Inconsiderate Pavement Parking, the draft **Planning Fees (Deemed Planning Applications and Appeal) (Amendment) Regulations (Northern Ireland) 2022** and the Review of permitted development rights for installation of domestic microgeneration equipment and reverse vending machines.

RESEARCH


Key publications in the year were:

Rural Planning in the 2020s, which highlights the changing face of rural areas across the UK and Ireland and identifies key challenges facing rural communities as a result of climate change, Brexit and Covid-19.

Planning Agencies – sets out the RTPI's suggestions for meeting public sector recruitment and career progression challenges in England.

Planning Enforcement Resourcing, which aims to attain a clearer understanding of what is currently happening on the ground with planning enforcement in England.

We began implementing the 2022-2024 research strategy by designing a new dissemination hub, which launched in 2023. This hub seeks to promote the importance of planning and also to support planners in enhancing their knowledge on important topics related to their profession.

In November 2022 we also published a practice advice note on  **Housing for Older People**.

We introduced the **Politicians in Planning Network**, which has the express purpose of bridging the gap in understanding between planning professionals and locally elected officials. This regular newsletter now has **more than 600 subscribers** and was supported by a networking event at the Local Government Association conference.

RTPI Scotland published ***Resourcing the Planning Service: Key Trends and Findings 2022*** which updated research on planning resources outlining the current state of the planning profession within Scotland. The report, which aims to inform discussion on the future resourcing of the planning system in Scotland, outlines steps needed for the planning system to play a leading role in supporting the post-COVID recovery.

The Future Planners report was published on how to increase supply of planners and promote planning as a career in Scotland and was taken forward in partnership with Heads of Planning Scotland, the Improvement Service and Scottish Government. This has resulted in a business case for a planning apprenticeship programme in Scotland has submitted to Scottish Government.

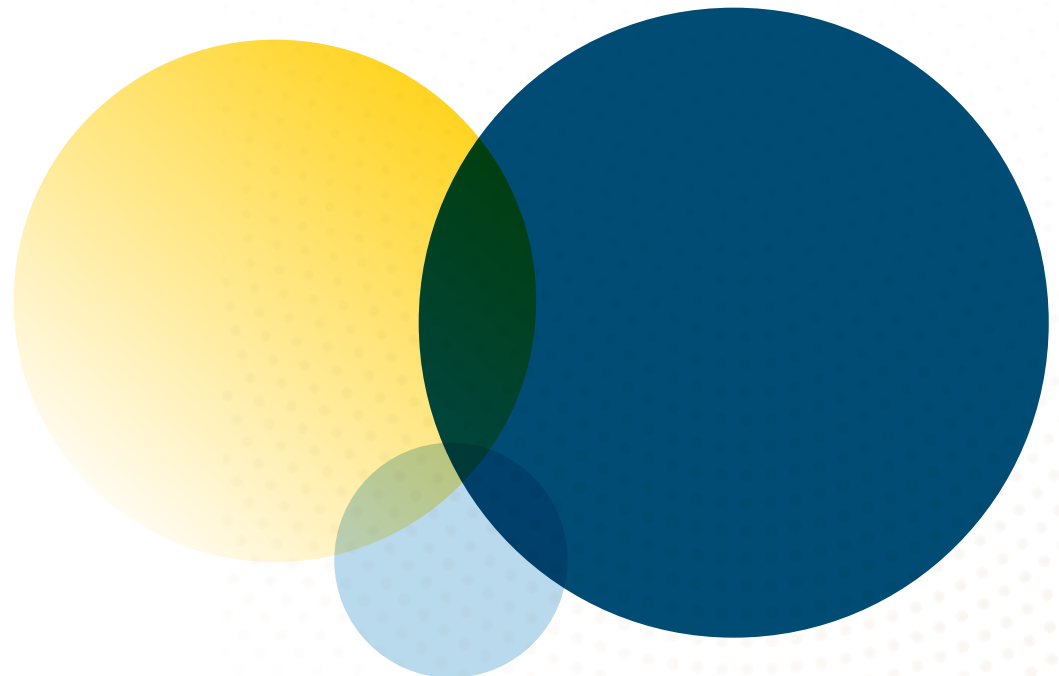
RTPI Scotland published and promoted a manifesto on the ***Importance of Planning for the Scottish Local Government Elections*** and we also organised 4 roundtable discussions on the draft 4th National Planning Framework and throughout the year engaged with Ministers, government officials, Scottish Parliament committees, MSPs and RTPI members to influence the content and deliverability of the framework.

RTPI Ireland attended 5 meetings of the Ministerial Planning Advisory Forum and published 3 papers to help inform the Planning Review and which lead to publication of the new draft Planning and Development Bill.

RTPI Cymru published *Living Locally in Rural Wales*, a discussion paper which explores the concept of living locally in rural areas in Wales and whether the guiding principles behind the 15 minute neighbourhood model can be applied in more remote rural areas. It also explores what role the planning system can play in supporting more sustainable, local living in rural Wales.

Local Authority Champions

In England, the North West region expanded its Local Authority Champions initiative with the launch of a new engagement plan which set out how the region plans to support authorities over an 18 month period.



Raising the profile of planning

PILLAR 3

The communications function of the RTPI underwent significant change throughout 2022. The objective of this change was to develop a team that could best support the organisation in achieving Pillar Three.

Structurally the team was reshaped around channel expertise. This means we now have post holders with professional experience in media relations, member and internal communications, web management, social media and public affairs. Support for the wider institute was introduced through a rolling fortnightly grid, an operational grid and a new communications strategy approach for each project.

This approach has resulted in significant audience growth across web, media and social media. While the public affairs function has been able to effectively engage with a raft of consultations, a shifting political landscape and primary legislation in the Levelling Up and Regeneration Bill.

We launched  **Planning Your World**, which aims to demystify planning and raise awareness of the profession and by the end of 2022 this had been **visited more than 25,000 times** and continues to find an audience.

A coordinated series of external engagements were also delivered throughout the year which saw the communications team support senior members and staff at UKREiif, the Local Government Association conference and the major political conferences. These were all supported with bespoke speaking events to highlight planning's centrality to various societal objectives.


We also hosted a series of events within third party spaces.

These included:

- **Planning is Global 1** launch at MIPIIM hosted in the Department for Trade pavilion;
- **Planning Agencies** launch at the Local Government Association conference;
- **A platform debate** alongside the Joint Institutes and roundtable event at Labour Party Conference in Liverpool;
- **A platform debate** alongside the Joint Institutes and roundtable event at Conservative Party Conference;
- **A World Town Planning Day** celebration event and launch of Planning for Tomorrow's Environment at Barbican in London; and
- **Planning is Global 2** launch in Dubai.

To coincide with **World Town Planning Day** we launched **Planning For Tomorrow's Environment**; a series of events, films, podcasts and social media promotion which focused on the positive impact that planning can have on carbon reduction and tackling the climate crisis.

The inaugural RTPI Scotland Awards for Planning Excellence were organised, attracting 26 entries and with the overall award presented to the Fraserburgh 2021 project.

The RTPI responded to  **45 consultations in 2022** on a variety of topics across the nations to continue our efforts to campaign for and articulate the purpose and value of planning.

2022 was also the year that we supported the delivery of a renegotiated publication schedule and redesigned website for The Planner.

Political engagement

England

In 2022 this included: Leading commentary about planning reform, delivering briefings on the Levelling Up and Regeneration Bill as it made legislative progress through Commons and Lords. The RTPI were successful in adding three amendments to the Bill at point of writing. We built our reputation as a trusted voice on planning: speaking at **7 select committees** and **3 All-Party Parliamentary Group (APPG)**, meeting **more than 30 MPs and Lords** and responding to numerous fiscal and other political events.

This was all done while maintaining our ministerial relationships through a difficult period, encouraging ministers to focus on the professions concerns and demonstrate thought leadership to offer constructive solutions at a variety roundtables and face-to-face meetings.

Given the political landscape we were also able to Strengthen our relationships with opposition parties, including Labour, Liberal Democrats and Greens and Metro Mayors.

Scotland

RTPI Scotland engaged in **18 committees**, advisory or working groups, met with **35 different organisations** and spoke at **12 events**.

Wales

The Wales Awards winners were announced at the first RTPI Cymru Summer Party in July held at the Morgan Arcade (home to RTPI Cymru).

Northern Ireland

The Director for NI spoke on BBC NI Newsline (March) and on a panel on BBC Radio Ulster's Inside Business show on 1st April, discussing planning in Northern Ireland in the light of the Public Accounts Committee's Report on the planning system.

Gortin Glen Forest Park, a sustainable family orientated outdoor experience submitted by Fermanagh & Omagh District Council was announced as winner of the RTPI NI Awards for Planning Excellence and Juno Planning was named as the first winner of Northern Ireland's Small Consultancy of the Year.

Europe

The RTPI supports Janet Askew to hold the presidency of the European Council of Spatial Planners (ECTP-CEU) during 2022 and 2023. Janet was invited to speak on behalf of European Planning at the World Economic Forum in Davos.

International engagement

PILLAR TWO AND THREE

International Strategy

The priority for the International Committee for 2022 has been to work on an implementation plan for the International Strategy 2021-2030. The plan was developed through a series of workshops and is structured around the 5 elements of the strategy (4 pillars and internationally focused groups). Some identified actions work across the strategy whilst others are focused on specific aims and objectives. The plan as it stands covers the period to 2025 and it is intended to be a working document to be reviewed quarterly by the Committee and will form the basis of their work plan.

Engagement

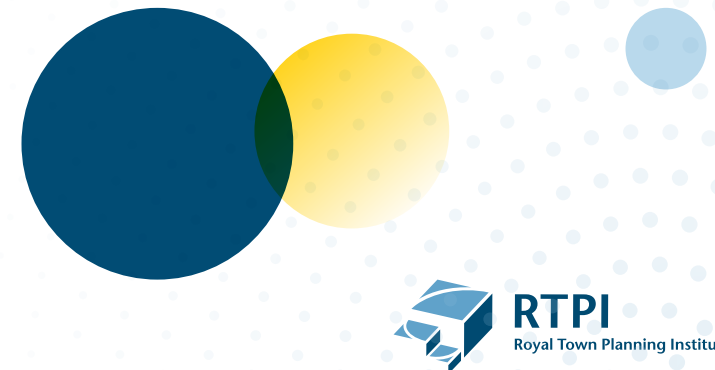
The RTPI was represented at major international events in the year including the UN-Habitat World Urban Forum where we led and co-ordinated a number of events/activities. In 2022 RTPI has continued to engage

with international organisations and platforms to raise the profile of planning. Those organisations include UN-Habitat and UN co-ordinated groups and platforms such as the World Urban Campaign and the Habitat Professionals Forum as well as the Global Planners Network, the Commonwealth Association of Planners and the European Council of Spatial Planners. A number of RTPI members are actively engaged with those organisations and hold senior roles within those structures.

As well as the Planning is Global is a campaign another key international project in the year was the flagship campaign for World Town Planning Day (WTPD) to highlight how good planning improves the lives of people and benefits society at large. In 2022, the campaign had a number of components. The RTPI as Secretariat for the Global Planners Network (GPN), a role we took over in 2022, was instrumental in co-ordinating the planners' global response in the form of a GPN WTPD statement

and relaying the message on social media.

The RTPI developed a communication campaign around WTPD, providing guidance on messaging and encouraging members to share their stories on the positive impact of planning using specific # and easily downloadable WTPD log from the RTPI website. WTPD also demonstrated that the RTPI internationally focused groups are a key avenue to engaging members with planning-led solutions to climate change and sustainable development. RTPI South West International Group together with Yorkshire International Group and West Midlands International Group came together to organise a special WRTP RTPI online series webinar: Planning for resilient cities showcasing innovative solutions around the world and attracting a global audience.



Planning Aid England



324
volunteers



1,600
requests for advice




85%
service-user
satisfaction rating



120,000
unique website hits

Planning Aid England (PAE) provides a range of services and support to empower individuals and communities to engage in the planning process. We provide free, independent, and professional general planning advice

to the public via our planning guidance website

 www.planningaid.co.uk and our volunteer-led email advice service. We also offer bespoke advice (casework) for individuals and groups who meet our eligibility criteria, and we organise support and training for local communities so they can influence and contribute to planning strategy and decision-making locally.

Supporting planning services

PILLAR TWO

In 2022, we worked with Local Planning Authorities (LPAs) including Bristol City Council, Stockport Council, and Middlesbrough Council to support communities in more socio-economically disadvantaged areas engage in planning in their local area.

PAE's planning guidance website



www.planningaid.co.uk, email advice, and casework offer, provide under-pressure planning officers with an independent, professional service that they can direct enquiries to.

We held a volunteer-led training event on 'The Local Plan Process for Elected Members' (with RTPI South West) to facilitate effective elected member engagement in planning.

You can read more at  support-for-local-authorities

Raising the profile of planning

PILLAR THREE

Volunteer delivery of PAE's services presents planners in a very positive light to the public with feedback from the advice service is testament to this:

“Good well explained answer, timely and concise. Gave me the details I needed, excellent thank you!”

“Very prompt reply and straight to the answer I was looking for. Thanks so much.”

Promoting equality, diversity and inclusivity

PAE is built on the principle that that everyone should have access to the planning system, regardless of their ability to pay.

Specific examples include:

- Volunteer-led training event for PAE volunteers on 'Planning for Neurodiversity and Physical Disability' (with RTPI North West);
- Delivered 18 new pieces of casework supporting clients who cannot afford to pay professional fees and those traditionally not involved in the planning system;
- Trained community representatives in a socio-economically disadvantaged area of Bristol on how to respond to a consultation on planning applications for major development schemes; and
- Assisted an inner urban Neighbourhood Forum in a socio-economically disadvantaged area of Middlesbrough in preparing a Neighbourhood Priorities Statement (this is ongoing work).

Promoting Equality, Diversity and Inclusivity



PILLAR 4

100

young people placed
for work experience

Inclusive framework

for employers launched

Highlights Of The Year

Our vision is **“To be, and promote the planning profession to be, as diverse as the communities it represents, to act inclusively, treating everyone fairly and seeking to provide a culture which delivers the best outcomes for the diverse society in which and for whom we work.”**

To achieve this we have developed a broad range activity captured in our CHANGE action plan broadly this work falls into two areas:

- Creating a diverse and inclusive profession; and
- Supporting the profession to be diverse and inclusive.

Across 2022 we took a number of strides/steps forward.

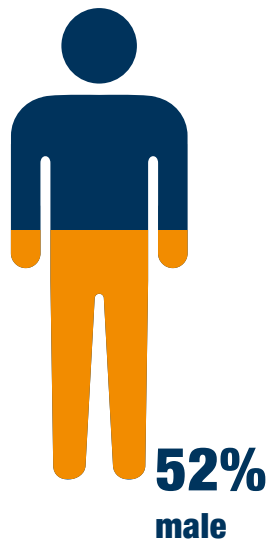
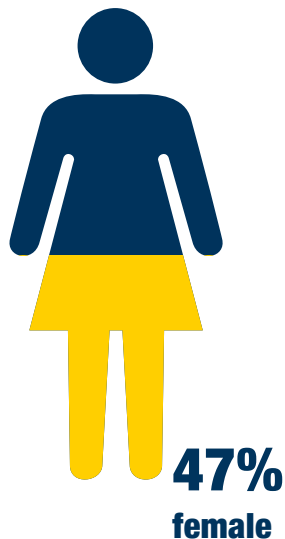
EXPLORE

Our EXPLORE work experience pilot, launched in January 2022, provided young people the opportunity to explore the many rewarding roles and opportunities that the planning profession can provide.

Working with 25 different employers in 36 offices
and across three UK/RTPI nations.

100

young people were placed of which:



34%

were of Asian heritage

19%

were of Black African/
Caribbean heritage



97%
positive
experience

70%+



Saying it was excellent

In student evaluations no student selected the 'poor' option. Students were overwhelmingly positive with the **majority (97%)** rating their overall experience as positive; with **over 70%** saying it was excellent.



Before placements,
43% of young people
said they would consider
a career in planning and
after placements



90% said they would.




Of the 90% who would now
consider a career in planning,
**52% were
definite 'yes'**

**A strong indication,
that exposure to the
planning profession
can and will
increase interest
in the profession.**

Inclusive Framework

Creating and supporting an inclusive profession for our members means that we have to have a way to support employers; to work with them to design and deliver tailored and realistic EDI strategies and support them as they undertake a journey of continuous improvement. Inclusive employers will not only help our members to thrive but also greatly help ensure a profession that is as diverse as the communities it represents.

We launched our  **Inclusive Framework** aimed at employers who provide a planning service and employ Chartered Town planners to do so. **The scheme supports them to:**

- Build an inclusive culture;
- Recruit equitably;
- Invest in EDI as part of staff CPD; and
- Have policies and processes that drive and support equity, inclusion, and diversity.

There are four levels reflecting the actions and progression that employers can take over time:

Currently we have 5 signatories, Milton Keynes Council, DP9, Pegasus, Eden Planning and Nexus Planning they range from small planning consultancies to local authority planning teams. We are working with them on their recruitment process, developing their employee handbooks and policies.

Driving change across the built environment

Planning and planners sit at the nexus point for the full range of built environment professionals from architects to those working in construction and chartered surveyors to civil engineers planners provide the canvas on which they work.

This pivotal position means that planners necessarily engage with the whole built environment so creating a truly inclusive profession also means making sure that it is part of an inclusive sector. No member should, for example, be concerned about comments that they may be subject to when going on a site visit.

In recognition of this the RTPI is one of the leading/ driving forces behind the “MoU 6” working together to improve EDI across the built environment. This joint commitment was solidified through the signing of a Memorandum of Understanding (MoU) in April 2022 swiftly followed by a detailed action plan in June 2022.



Climate Action

The RTPI's Climate Action Plan

In 2020 the Trustees approved the Institute's **Climate Action Plan** under which a commitment to **achieve net zero by 2025** was made. It also underlined the support for members in addressing the challenge of climate change in their own practice. The pandemic restrictions resulted in a step change in the Institute's own greenhouse gas emission with the reduction in travel and office use. The decision to refurbish the Institute's London office presented the opportunity to preserve some of the reduction through energy reduction initiatives.

The reopened office is now powered from renewable sources as there is no longer any gas services in the building. New windows with energy efficient glassing and energy efficient lighting have been installed and the office is now a paperless working environment. Prior to the refurbishment the building could not be given an Energy Performance Certificate but it has **now achieved a B rating**.

Part of the Climate Action Plan was a Climate Impact Assessment of the Institute's activities. This was conducted for the year 2019 and indicated the total CO2 emissions of the Institute amounted to 175.6 tonnes. An assessment is now being completed for the year 2022 which will give an indication of the progress made in reducing emissions in line with the net zero commitment.

Montshire District Design Code

Design Code for Net Zero and Nature Recovery



BSG ecology

LD&A DESIGN



Site Level Design Code

Design Code for Net Zero and Nature Recovery




BSG ecology

LD&A DESIGN




Climate Change for the profession

We published  **Cracking the Code** – how design codes can deliver net zero and biodiversity.

We have also responded to a number of government consultations related to addressing the climate crisis, including:

- response to  **BEIS net zero review: call for evidence**
- response to  **draft UK National Air Pollution Control Programme**
- response to  **DEFRA Biodiversity Net Gain Regulations and Implementation consultation**

We also updated our planning guidance for the public on the topic of  **domestic renewables**.

Support Services

Diversifying Sources of Income

Despite the impact of the pandemic on sources of non-subscription revenue new ways of supporting the financial sustainability of the Institute have continue to be explored. In 2022 the number of events delivered centrally increased and the subsidy required reduced.

A new partnership with the Planning Portal was trialled for the production of a **National Planning Conference**. The number of Training Master Classes delivered by the central training team and delegates attending them increased and for the first time **no subsidy was required** to support this service. Work has started on proposing a **One Institute Training and Events Strategy** to bring the services of

the central team and teams from the nations and regions together with one seamless offer for members.



Digital Transformation

The first phase of investment in **Digital Transformation**, our programme of automation to provide more cost effective and member-centric processes, **was completed in 2021. Phase Two started in 2022** to support improvements in functionality, enabling paperless direct debts and the subscription renewals process to be further streamlined. Changes were also made to **remove risk and enhance business continuity** an ongoing priority given the increasing threats involved with cyber security.

Right Homes for the RTPI

London office, Botolph Lane retrofit: In 2021 the trustees decided to invest in upgrading the London office to create a flexible modern working environment. The Retrofit programme completed in December 2022 delivered a full refurbishment and redecoration of the building (internal and external), complete with updated furniture, lighting and finishes. It also changed the way the building is used to create a more flexible and modern working environment. For example, the basement now includes a bicycle storage area, to encourage active travel and enable colleagues and visitors to keep their bike safe while. It also has new lockers, shower facilities, a wellness room and just one printer for the whole building. The ground floor area has a spacious area to welcome visitors as well as a staff breakout area, while the first floor houses the members' area with touchdown space, lounge area, president's office and members' library.

Office floors have reduced desk space, but more meeting rooms, as well as quiet rooms for individual working and a new digital studio to support communications and virtual event and training production.



Call the RTPI's
front desk in advance on
0370 774 9494 to
book into the dedicated
members' area.

Plans for Future Periods

Our aims and objectives for 2023 and beyond are to continue to implement the 2020-2030 Corporate Strategy. To achieve this we will aim in 2023 to:

- 1. GROWPLAN:** to move from consultation and engagement with members to delivery of interventions – focus on growing chartered members and attracting experienced planners who are not members.
- 2. INFINITY:** to refine our digital offer to members, and non-members, across the nations and regions – how they join, how they pay, how they interact with us, how they purchase products and services, and how they receive information from us.
- 3. INFLUENCE:** to maintain and grow our influence on planning policy and practice across the nations – be recognised as a credible, authoritative, and trusted voice of the profession.
- 4. BRAND:** to finish the brand strategy work and launch to members – build upon the success of the RTPI's reputation to further illustrate our identity and cement our position as a leader within the built environment professions.
- 5. PERCEPTION:** to continue telling the story of planning and planners to a broader audience – no stone unturned to amplify our excellent research work and celebrate the stories of exemplary planning.

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: SC 037841).

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

Trustees

President 2022:

[Timothy Crawshaw](#) (until 31 December 2022)

Immediate Past President 2022:

[Wei Yang](#) (until 31 December 2022)

Chair of the Board and Vice President 2022:

[Susan Bridge](#)

Chair of the Board 2023:

[Meeta Kaur](#)

Honorary Treasurer:

[Andrew Taylor](#) (until 31 December 2022)

Honorary Solicitor and Secretary:

[Bernadette Hillman](#)

Trustee for Young Planners:

[Tsz Lok Ng](#)

Trustee for Scotland/Nations:

[Stefano Smith](#)

Trustee for Regions and Nations:

[Rebecca Dewey](#) (until 31 December 2022)

Trustee for England:

[Benjamin Vickers](#) (from 1 January 2023)

Independent Trustees:

[John Powell](#) (until 31 December 2022)

[Sean Fox](#)

Elected Trustees:

[Tony Crook](#)

[Janet Askew](#)

[Tom Venables](#)

[Sameer Bagaeen](#) (from 1 January 2023)

[Ellenclaire Cass](#) (from 1 January 2023)

Senior Executive Team:

Chief Executive

Victoria Hills

Chief Operating Officer

Richard Patrick

Director of Scotland & Ireland

Craig McLaren

Director of Wales & Northern Ireland

Roisin Willmott

Director of Education

Andrew Close

Director of Communications

Simon Creer

Chief Technology Officer

Anil Ramdhan

Other relevant organisations:

The Institute's bankers are

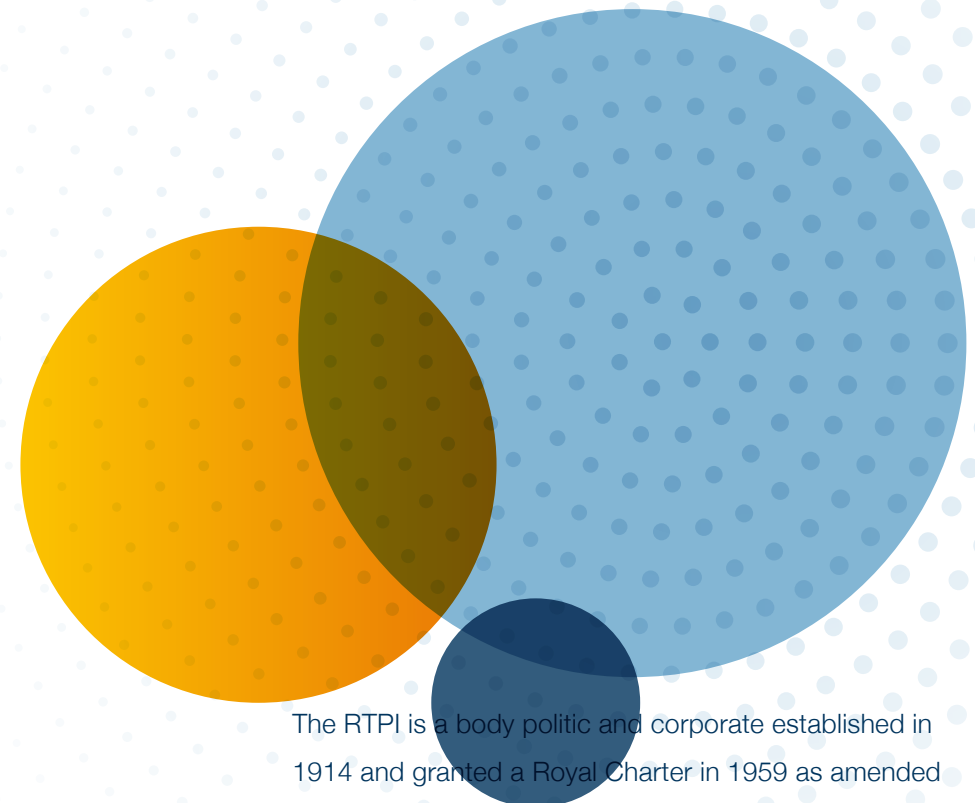
HSBC Bank PLC,
City of London Commercial Centre,
Level 6, 71 Queen Victoria Street,
London, EC4V 4AY.

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 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

Structure, Governance and Management

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.

The Chair of the Board of Trustees is elected by the General Assembly for a term of three years, eligible to be re-elected for a further term of three 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.

At the start of 2022 changes were agreed to the regulations and by-laws with **95% of Chartered members endorsing the proposals**. The key changes are to reduce the size of the board **from 17 to 13 Trustees**.

The terms of appointment of the Trustees (excluding the Chair, the Co-opted Trustees and the Presidential Team) is now three years, renewable once. At the end of the second term/sixth year in office, the Trustee will have to stand down for at least one year unless they are elected to a new role. If the Trustee (including the Chair and the Honorary Solicitor and Secretary) is selected to a new role after serving on the Board of Trustees for six years or three years, the maximum period they can be on the Board of Trustees is nine years in total. After an individual has served for nine years in their position which would have resulted in them being part of the Board of Trustees, they shall not be eligible for re-election to a position that would result them being part of the Board

of Trustees until they have been out of office for at least one year. The changes will be implemented as each position comes up for election.

Full details of the changes can be found at

 **RTPI | What are the proposals in detail?**

Members of the General Assembly elect Trustees to serve for a three-year period. The General Assembly elects up to five Chartered members plus one Chartered member to represent England, and one to represent Ireland, Scotland, Wales and Northern Ireland and one Young Planner. The Board of Trustees may elect up to two co-opted Trustees for such renewable terms as the Board of Trustees may determine.

The Trustees have currently agreed two co-opted independent Trustees positions to provide additional skills in finance and with expertise in digital transformation and Customer Relationship Management (CRM) systems.

Newly elected Trustees attend an RTPI induction session to understand an overview of the current work plans and structure of the RTPI. All Trustees are 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 Ireland, 2 from RTPI Scotland.

Subsidiary Undertaking


RTPI Services Limited, which is a wholly owned subsidiary of the RTPI, ceased to trade with effect from 1 January 2019. Its assets and liabilities have been consolidated in this set of financial statements.

Related Charity

The RTPI Trust is consolidated with the Institute as the RTPI appoints its trustees. Its assets and liabilities have been consolidated in this set of financial statements.

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 35**.

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:

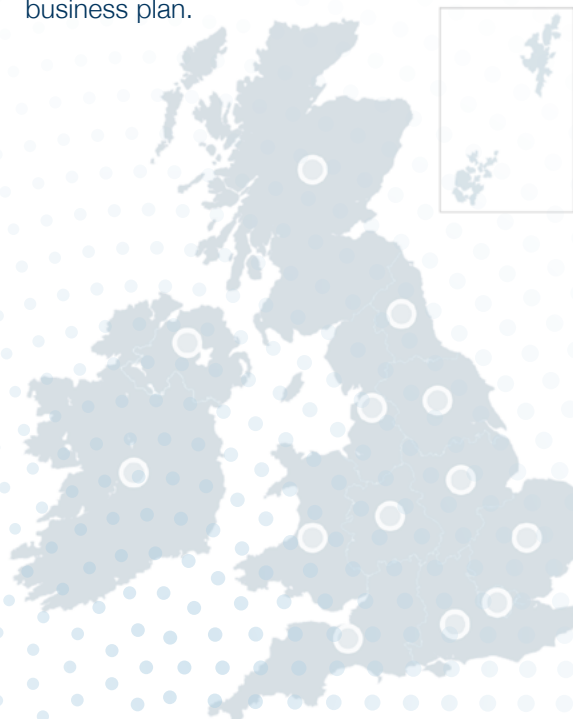
- Audit and Risk Committee
- Finance Committee
- Nomination Subcommittee
- Appointment and Remuneration Committee

Nations and Regions:

To manage the affairs of the nations there are the following National Executive Committees:

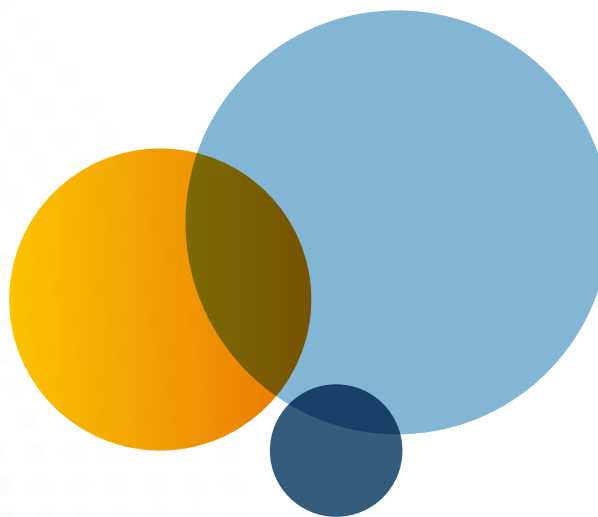
- RTPI Cymru
- RTPI Ireland
- RTPI Northern Ireland
- RTPI Scotland

England is split into 9 regions which each operate a Regional Management Board to deliver its regional business plan.



Risk Review

The Trustees have identified and regularly review the major risks to which the Royal Town Planning Institute is exposed. The Trustees monitor the management controls and actions in place to manage the risks. The risks and the related controls are reviewed by the staff of the Institute and the Trustees on an ongoing basis and the risk register updated accordingly. The risk register is a standing item on the Board of Trustees meeting agenda and is reviewed monthly by the Senior Executive Team. The register is also reviewed by the Audit and Risk Committee.



Further details can be found at



RTPI | Find your RTPI

The principal key risks on the risk register 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**

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
- All staff communication process in place for emergencies
- Cloud based operation and upgraded backup systems
- Two factor authentication for systems access and upgraded firewalls
- Succession planning

RTPI Data Assets Compromised – key elements in the management of this risk include:

- Multifactor Authentication in place for all key data assets and systems
- Firewall protection in place, regularly updated and reporting used to access risk daily
- Mandatory cyber security training for all colleagues
- Secure back-ups and conditional access policy in place

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. Members also support the work of Planning Aid England in delivering planning advice to members of the public.

The RTPI wishes to thank all volunteers for their contributions to and continued support of the work of the Institute.

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 the 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 the 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.

Financial Review

Results for the Year

Net expenditure for the year after investment losses for the group was **£163k (2021: net income £552k)** and for the Institute was **£144k (2021 net: income £461k)**

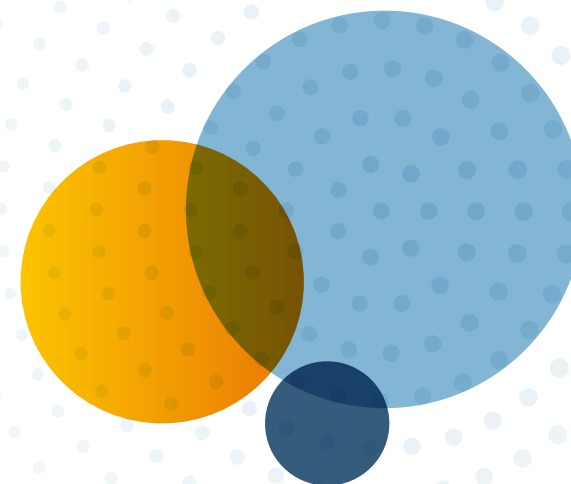
Subscription rates were **increased by 2%** in 2022 and with growth in chartered members in 2021 positively impacting revenue in 2022 and good retention rates, subscriptions' and fee income was **up 4.5% to £5,392k (2021: £5,158k)**. Planner Jobs performed well in the year due to the buoyant recruitment market and in person events returned both of which increased income. Overall income was **up nearly 14% on 2021**.

Group expenditure **increased by 13.1% to £7,440k in 2022**. Significant variances included the increase of venue hire as we returned to in person events and meetings in 2022 and increased staff costs.

Investment Policy and Performance

The long-term objective of the Institute's investment performance is to achieve a return of inflation (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 they are a signatories to the UN Principles of Investment. The focus is for our investment managers to identify and invest 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 they are expected to consider such factors as carbon footprint, resource use, waste reduction and gender equality.

The net losses on investments for the group were **£508k (2021: gains £296k)** and for the Institute were **£491k (2021: gains £260k)**. The current investments are split between funds with different risk profiles and asset type. Investment income for the charity was **£99k (2021: £80k)**. Returns for the year were worse than the target set in the policy: Total return for the year for the charity **was (10.0)%** verses December 2021 CPI **plus 2% of 12.5%**. The returns reflected the difficult market conditions in 2022 but the suffered volatility was within the Investment Policy.



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 Trustees have agreed appropriate to hold is **£3.17million to £4.17 million (2021: £3.15-4.15 million)**. The Trustees consider **20%** of operating income, **15%** of operating costs plus **£500k** for unforeseen costs and up to **£1million** to invest in unexpected opportunities closely reflects the risks of the Institute. As at 31 December 2022 the general reserve is **£5,866k**. The Institute is therefore holding excess reserves of **£1.7million at 31 December 2022**.

The Trustees have agreed on a policy of maintaining a breakeven operating budget over the three-year planning period while allocating additional funds to approved projects from these excess reserves. The principal projects underway are related to the Corporate Strategy Implementation Plan and the Digital Transformation project.

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 **£3,356k** at the year-end (2021: **£1,383k**).

Full details of designated funds created by the Trustees are in note 13.

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

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 24 May 2023

and signed on their behalf by:

Sign: Meeta Kaur

Meeta Kaur

Chair of the Board

Independent Auditor's Report

For the year ended 31 December 2022

Opinion

We have audited the financial statements of The Royal Town Planning Institute ("RTPI") for the year ended 31 December 2022 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 2022 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.

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 41**, 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; and
- Challenging assumptions and judgements made by management in their critical accounting estimates
- Agreeing the validity of recognised receivables on a sample basis and challenging the recoverability assumptions, further assessing for any fraud or bias

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

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.

Sign: Haysmacintyre LLP

Haysmacintyre LLP
Statutory Auditors

10 Queen Street Place
London, EC4R 1AG

Date: 5 June 2023

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

Consolidated Statment of Financial Activities

(Including consolidated income and expenditure accounts)

Year ending 31 December 2022

	Notes	Unrestricted Fund £'000	Restricted Funds £'000	Total 2022 £'000	Unrestricted Fund £'000	Restricted Funds £'000	Total 2021 £'000
INCOME FROM:							
Donations and legacies		–	145	145	–	56	56
Charitable activities							
Membership subscriptions and fees		5,392	–	5,392	5,158	–	5,158
Grants and sponsorship towards the promotion of spatial planning and membership		382	168	550	265	101	366
Support for members		1,572		1,572	1,119	40	1,159
Planning Aid		–	–	–	8	–	8
Investments	4	119	7	126	81	5	86
Total income		7,465	320	7,785	6,631	202	6,833
EXPENDITURE ON:							
Charitable activities							
Support for members and promotion of membership of the Institute		4,410	135	4,545	3,802	70	3,872
Promotion of spatial planning		2,681	27	2,708	2,370	94	2,464
Planning Aid		187	–	187	236	5	241
Total expenditure	5	7,278	162	7,440	6,408	169	6,577
Net income/(expenditure) before investment gains		187	158	345	223	33	256
Net (losses)/gains on investment assets		(491)	(17)	(508)	261	35	296
Net (expenditure)/income		(304)	141	(163)	484	68	552
Transfers between funds	13	–	–	–	20	(20)	–
Net movement in funds		(304)	141	(163)	504	48	552
Reconciliation of funds							
Fund balances at 1 January		10,628	908	11,536	10,124	860	10,984
Fund balances at 31 December		10,324	1,049	11,373	10,628	908	11,536

Charity Statment of Financial Activities

Year ended 31 December 2022

	Notes	General Fund £'000	Designated Funds £'000	Restricted Funds £'000	Total 2022 £'000	Total 2021 £'000
INCOME FROM:						
Legacies		–	–	141	141	–
Charitable activities						
Membership subscriptions and fees		5,392	–	–	5,392	5,158
Grants and Sponsorship towards the promotion of spatial planning and membership		382	–	168	550	366
Support for members		1,572	–	–	1,572	1,159
Planning Aid		–	–	–	–	8
Investments	4	119	–	–	119	81
Total income		7,465	–	309	7,774	6,772
EXPENDITURE ON:						
Charitable activities						
Support for members and promotion of membership of the Institute		4,108	302	122	4,532	3,866
Promotion of spatial planning		2,620	61	27	2,708	2,464
Planning Aid		187	–	–	187	241
Total expenditure	5	6,915	363	149	7,427	6,571
Net income/(expenditure) before investment gains		550	(363)	160	347	201
Net (losses)/gains on investment assets		(491)	–	–	(491)	260
Net income/(expenditure)		59	(363)	160	(144)	461
Transfers between funds	13	(942)	942	–	–	–
Net movement in funds		(883)	579	160	(144)	461
Reconciliation of funds						
Fund balances at 1 January		6,749	3,869	540	11,158	10,697
Fund balances at 31 December		5,866	4,448	700	11,014	11,158

Charity and Consolidated Balance Sheets

As at 31 December 2022

		Charity		Consolidated	
		2022	2021	2022	2021
	Notes	£'000	£'000	£'000	£'000
Fixed assets:					
Tangible fixed assets	9	3,325	1,332	3,325	1,332
Intangible fixed assets	9	31	51	31	51
Investments	10	3,439	3,903	3,739	4,213
Total fixed assets		6,795	5,286	7,095	5,596
Current assets:					
Debtors	11	583	603	583	603
Short term deposits		1,051	2,594	1,051	2,664
Cash at bank and in hand		5,382	5,412	5,437	5,412
Total current assets		7,016	8,609	7,071	8,679
Liabilities:					
Creditors: Amounts falling due within one year	12	2,797	2,737	2,793	2,739
Net current assets		4,219	5,872	4,278	5,940
Total assets less current liabilities		11,014	11,158	11,373	11,536
Total Net Assets		11,014	11,158	11,373	11,536
The funds of the charity					
General		5,866	6,749	5,876	6,759
Designated	13	4,448	3,869	4,448	3,869
Restricted	13	700	540	1,049	908
Total charity funds		11,014	11,158	11,373	11,536

The notes on pages 53 to 71 form part of these accounts.

Approved by the Trustees on 24 May 2023 and signed on their behalf by:

Sign: Meeta Kaur

Meeta Kaur – Chair of the Board

Charity and Consolidated Statement of Cashflows

For the year ended 31 December 2022

CASH FLOWS FROM OPERATING ACTIVITIES

Net cash provided by operating activities

CASH FLOWS FROM INVESTING ACTIVITIES

Dividends, interest and rents from investments

Purchase of property plant and equipment

Purchase of software

Proceeds from sale of investments

Purchase of investments

Net cash provided by investing activities

Change in cash and cash equivalents in the year

Cash and cash equivalents at the beginning of the year

Cash and cash equivalents at the end of the year

NOTES TO THE CASH FLOW STATEMENT

a Reconciliation of net income to net cash inflow from operating activities

Net income before transfers

Loss of disposal of fixed assets

Depreciation charges

Losses (gains) on investments

Dividends, interest and rents from investments

Decrease /(increase) in debtors

Increase in creditors

Net cash provided by operating activities

b Analysis of cash and cash equivalents

Cash in hand

Notice deposits (less than 3 months)

Total cash and cash equivalents

Note	Charity		Consolidated	
	2022 £'000	2021 £'000	2022 £'000	2021 £'000
a	381	536	366	585
	119	81	126	86
	(2,046)	(160)	(2,046)	(160)
	–	(61)	–	(61)
	558	795	558	795
	(585)	(2,227)	(592)	(2,232)
	(1,954)	(1,572)	(1,954)	(1,572)
	(1,573)	(1,036)	(1,588)	(987)
	8,006	9,042	8,076	9,063
b	6,433	8,006	6,488	8,076

Charity

Consolidated

	2022 £'000	2021 £'000	2022 £'000	2021 £'000
	(144)	461	(163)	552
	–	128	–	128
	73	80	73	80
	491	(260)	508	(296)
	(119)	(81)	(126)	(86)
	20	(302)	20	(309)
	60	510	54	516
	381	536	366	585

Charity

Consolidated

	2022 £'000	2021 £'000	2022 £'000	2021 £'000
	5,382	5,412	5,437	5,412
	1,051	2,594	1,051	2,664
	6,433	8,006	6,488	8,076

Cash equals net debt so no further reconciliation required.

Notes to the financial statements

For the year ended 31 December 2022

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 was dormant in 2022 and 2021.

- d) 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). The majority of its Trustees are Past Presidents of the Institute who are appointed by the Institute therefore and its financial statements have been consolidated, on a line-by-line basis, in the Institute's group accounts.
- e) 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 2022 and 2021.
- f) 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 2022 and 2021.
- g) 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 2022 and 2021 following the merger of its business (previously trading under the name "ROOM") with the Institute in 2002.
- 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.

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	4%-10%
Office equipment and furniture	20%
Computer equipment	33.33%

h) **Intangible Assets**

All software assets are capitalised where the cost is over £1,000. Depreciation is charged on a straight-line basis at a rate of 33.33%, which will write off the cost of the assets over their useful life.

i) **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.

j) **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.

k) **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.

l) **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.

m) Pension costs

The RTPI operates a defined contribution scheme. Pension costs charged in the financial statements represent contributions payable by the Institute during the year. We operate a salary sacrifice scheme.

n) 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.

There are no critical estimates or judgements included in these financial statements.

o) 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.

p) Preparation of the accounts on a going concern basis.

The Trustees are satisfied that cash flow remains strong, income continues to be stable and operating costs are effectively managed. 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 £168k (2021: £101k) is a grant to support Scottish Government Digital Planning (£153k). There were no unfulfilled conditions in relation to government grants at the year end.

4. Investment income

	2022 £'000	2021 £'000
Interest receivable on short term deposits	20	1
Investment income receivable	99	80
Total investment income - charity	119	81
RTPI Trust – Investment income	7	5
Total investment income - group	126	86

5. Analysis of expenditure on charitable activities

Charitable expenditure - Charity

Support for members and promotion of membership of the Institute

	People related costs £'000	Other costs £'000	Total 2022 £'000	Total 2021 £'000
Direct costs	2,144	948	3,092	2,215
Governance costs	77	59	136	105
Allocation of overheads	661	643	1,304	1,546
	2,882	1,650	4,532	3,866

Promotion of spatial planning

Direct costs	968	1,125	2,093	1,661
Governance costs	33	25	58	51
Allocation of overheads	282	275	557	752
	1,283	1,425	2,708	2,464

Planning Aid

Direct costs	111	2	113	129
Governance costs	4	3	7	7
Allocation of overheads	34	33	67	105
	149	38	187	241

Total charitable expenditure - Charity

	4,314	3,113	7,427	6,571
--	--------------	--------------	--------------	--------------

Additional Group expenditure

Support for members

Direct costs	–	12	12	5
Governance costs	–	1	1	1
	–	13	13	6

Total charitable expenditure - Group

	4,314	3,126	7,440	6,577
--	--------------	--------------	--------------	--------------

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 FTE staff numbers.

5. Analysis of expenditure on charitable activities (Continued)

Prior Year Comparatives	People related costs £'000	Other costs £'000	Total 2021 £'000
Charitable expenditure - Charity			
Support for members and promotion of membership of the Institute			
Direct costs	1,742	473	2,215
Governance costs	67	38	105
Allocation of overheads	780	766	1,546
	2,589	1,277	3,866
Promotion of spatial planning			
Direct costs	742	919	1,661
Governance costs	33	18	51
Allocation of overheads	380	372	752
	1,155	1,309	2,464
Planning Aid			
Direct costs	121	8	129
Governance costs	4	3	7
Allocation of overheads	53	52	105
	178	63	241
Total charitable expenditure	3,922	2,649	6,571
Additional Group expenditure			
Support for members			
Direct costs	–	5	5
Governance costs	–	1	1
	–	6	6
Total charitable expenditure - Group	3,922	2,655	6,577

Allocation of overheads under "other costs" above comprise:

	2022 £'000	2021 £'000
Premises related costs	85	176
Office services	346	458
ICT	244	317
Legal and professional fees (excluding audit)	160	127
Irrecoverable VAT	116	112
Allocated overheads – total	951	1,190

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

	2022	2021
	£'000	£'000
Wages and salaries	3,148	2,902
Pension costs	557	516
Social security costs	343	301
	4,048	3,719
Agency staff	26	43
	4,074	3,762
Wages and Salaries includes redundancy and termination payments of £38k (2021: nil).		
Average number of staff employed	2022	2021
Support for members and promotion of membership of the Institute	56	51
Promotion of spatial planning	21	26
Planning Aid	4	4
Governance	3	2
	84	83

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

	No of employees	No of employees
	2022	2021
Earnings band		
£60,000 to £69,999	4	4
£70,000 to £79,999	2	4
£80,000 to £89,999	3	1
£90,000 to £99,999	1	–
£140,000 to £149,999	–	1
£150,000 to £159,999	1	–
	11	10

Pension contributions made during the year for these employees were **£93k (2021: £96k)**.

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 Chief Operating Officer, the Director of Scotland & Ireland, the Director of Wales & Northern Ireland, the Director of Education, the Director of Communications and the Chief Technology Officer. The total employee benefits of the key management personnel were £742k (2021: £698k).

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 12 trustees were reimbursed or had expenses paid on their behalf totalling £12k (2021: 14 trustees were reimbursed £13k) in respect of expenses actually incurred for travel, accommodation and subsistence.
- b) No trustees were paid for provision of consultancy services unrelated to their duties as Trustee (2021: one trustee - £3,336).

RTPI Trust

At the year-end £nil was due from RTPI Trust and is included within other debtors (2021: £nil) and £3k was due to the Trust (2021: £1k).

RTPI Services Ltd

Details of the transactions and balances with RTPI Services Ltd are shown in note 15.

There were no other related party transactions during the year (2021: none).

8. Remuneration of Auditor

The audit fees for the Institute were £18k during 2022 (2021: £14k) and for other services were £0.4k in 2022 (2021: £2k).

9. Fixed assets – Charity and group

	Tangible Fixed Assets					
	41 Botolph Lane					
	Freehold land	Refurbishment & plant	Office equipment & furniture	Total Tangible Fixed Assets	Intangible - software	Total fixed assets
	£'000	£'000	£'000	£'000	£'000	£'000
Cost						
At 1 January 2022	300	1,659	14	1,973	61	2,034
Additions	–	1,953	93	2,046	–	2,046
Disposals	–	–	(5)	(5)	–	(5)
At 31 December 2022	<u>300</u>	<u>3,612</u>	<u>102</u>	<u>4,014</u>	<u>61</u>	<u>4,075</u>
Depreciation						
At 1 January 2022	–	(630)	(11)	(641)	(10)	(651)
Charge for the year	–	(50)	(3)	(53)	(20)	(73)
Disposals	–	–	5	5	–	5
At 31 December 2022	<u>–</u>	<u>(680)</u>	<u>(9)</u>	<u>(689)</u>	<u>(30)</u>	<u>(719)</u>
Net Book Value						
At 31 December 2022	<u>300</u>	<u>2,932</u>	<u>93</u>	<u>3,325</u>	<u>31</u>	<u>3,356</u>
At 31 December 2021	<u>300</u>	<u>1,029</u>	<u>3</u>	<u>1,332</u>	<u>51</u>	<u>1,383</u>

10. Investments

	2022	2021
Group	£'000	£'000
Market value of listed investments at 1 January	4,213	2,480
Acquisitions at cost	592	2,232
Disposals at market value	(558)	(795)
Gains on investments	(508)	296
Market value of investments at 31 December	<u>3,739</u>	<u>4,213</u>
Historical cost as at 31 December	<u>3,166</u>	<u>3,214</u>

Material investments within the portfolio as at 31 December 2022 include:

CCLA COIF Charities Investment Fund £1,401k (37%);
 Newton SRI Fund for Charities £937k (25%);
 Sarasin Income and Reserves Fund £525k (14%); and
 Sarasin Endowment Fund £539k (14%).

	2022	2021
Charity	£'000	£'000
Market value of listed investments at 1 January	3,903	2,211
Acquisitions at cost	585	2,227
Disposals at market value	(558)	(795)
Gains on investments	(491)	260
Market value of investments at 31 December	<u>3,439</u>	<u>3,903</u>
Historical cost as at 31 December	<u>3,020</u>	<u>3,068</u>

11. Debtors

	Charity		Consolidated	
	2022	2021	2022	2021
	£'000	£'000	£'000	£'000
Prepayments	204	145	204	145
Other debtors	379	458	379	458
	<u>583</u>	<u>603</u>	<u>583</u>	<u>603</u>

12. Creditors: amounts falling due within one year

	Charity		Consolidated	
	2022	2021	2022	2021
	£'000	£'000	£'000	£'000
Receipts in advance	2,241	2,118	2,241	2,118
Other taxes and social security costs	1	79	1	79
Other creditors and accruals	550	537	551	542
Amounts due to subsidiary	5	3	–	–
	<u>2,797</u>	<u>2,737</u>	<u>2,793</u>	<u>2,739</u>

Receipts in advance represent member payments received in advance for 2023 membership and monies received for events being held in 2023 all of which are expected to be recognised as income in 2023.

Charity and Group	£'000
Receipts in advance b fwd	2,118
Amounts recognised in the year	(2,118)
Income deferred in the year	2,241
Receipts in advance b fwd	<u>2,241</u>

13. Outline summary of fund movements

Designated Funds

	Fund balances brought forward 1 January 2022 £'000	Expenditure £'000	Transfers £'000	Fund balances carried forward 31 December 2022 £'000
Charity and group				
Fixed assets	1,383	(73)	2,046	3,356
Property and maintenance	1,611	(54)	(1,523)	34
Research	86	(36)	140	190
Education Research	7	(7)	–	–
Regions	252	(7)	–	245
Corporate Strategy Implementation Plan	213	(137)	2	78
Digital Transformation	230	(11)	223	442
HR and compliance	87	(20)	–	67
Brand strategy	–	(18)	54	36
	<u>3,869</u>	<u>(363)</u>	<u>942</u>	<u>4,448</u>

Designated Funds

	Fund balances brought forward 1 January 2021 £'000	Expenditure £'000	Transfers £'000	Fund balances carried forward 31 December 2021 £'000
Charity and group				
Fixed assets	1,370	(209)	222	1,383
Property and maintenance	189	(28)	1,450	1,611
Research	124	(38)	–	86
Education Research	8	(1)	–	7
Regions	252	–	–	252
COVID-19	–	(1)	1	–
Corporate Strategy Implementation Plan	103	(53)	163	213
Digital Transformation	50	(90)	270	230
HR and compliance	–	–	87	87
	<u>2,096</u>	<u>(420)</u>	<u>2,193</u>	<u>3,869</u>

13. Outline summary of fund movements (continued)

Fixed assets

The Trustees have decided to create a designated reserve equal to the net book value of fixed assets not allocated to restricted funds or another designated fund, which represents assets in use for charitable purposes.

Property and maintenance

These funds were set aside by the Trustees to fund major repairs to Botolph Lane in 2021/22. The remaining balance is for future repairs and maintenance.

Research

During 2022, the Trustees allocated funds for the RTPI research programme for 2022-2024. The purpose of the Research Fund is to manage the delivery of the RTPI's research programme and matched funding where appropriate.

Regions

These reserves were accumulated under the previous regional funding arrangements, which ended in January 2018.

Corporate Strategy Implementation Plan

This fund was set up to realise the content of the Corporate Strategy 2020-2030.

Digital Transformation

This fund represents the next phase in the Institute's investment in its online presence and IT systems. £270k was added to the fund in 2022 and £90k of the allocated fund was spent.

HR and compliance

This fund represents monies set aside by the trustees to spend on future HR and compliance work.

13. Outline summary of fund movements (continued)

Restricted Funds	Fund balances brought forward 1 January 2022 £'000	Income £'000	Expenditure £'000	Gains/ (losses) £'000	Transfers £'000	Fund balances carried forward 31 December 2022 £'000
George Pepler International	51	–	–	–	–	51
Lichfield Memorial Lecture	13	–	–	–	–	13
Peter Suttie Award	7	–	–	–	–	7
Future Planners' Bursary Fund	12	–	(11)	–	–	1
MHCLG Future Planners Funds	76	–	(76)	–	–	–
Scottish Government Bursary Fund	15	–	–	–	–	15
Practitioner Research Fund	128	–	–	–	–	128
National Planning Framework 4 Engagement	17	15	(15)	–	–	17
Scottish Government Digital Planning 2022-23	–	153	(19)	–	–	134
Scottish Government Digital Planning 2021	33	–	(27)	–	–	6
Julie Cowan Memorial Trust	39	–	(1)	–	–	38
Prof A Hall Legacy	–	141	–	–	–	141
Other	7	–	–	–	–	7
Planning Aid						
Grants and Donations	110	–	–	–	–	110
West Midlands Planning Aid	25	–	–	–	–	25
Gypsy and Traveller Training	7	–	–	–	–	7
Charity	540	309	(149)	–	–	700
Michael Welbank Fund	52	–	–	–	(3)	49
RTPI Trust General Fund	316	11	(13)	(17)	3	300
Group	908	320	(162)	(17)	–	1,049

13. Outline summary of fund movements (continued)

Prior year comparatives

Restricted Funds	Fund balances brought forward 1 January 2021 £'000	Income £'000	Expenditure £'000	Gains/ (losses) £'000	Transfers £'000	Fund balances carried forward 31 December 2021 £'000
George Pepler International	51	–	–	–	–	51
Lichfield Memorial Lecture	15	–	(1)	(1)	–	13
Peter Suttie Award	7	–	–	–	–	7
Future Planners' Bursary Fund	34	–	(2)	–	(20)	12
MHCLG Future Planners Funds	95	–	(19)	–	–	76
Scottish Government Bursary Fund	38	–	(23)	–	–	15
Practitioner Research Fund	137	–	(9)	–	–	128
National Planning Framework 4 Engagement	24	–	(7)	–	–	17
Scottish Government Digital Planning 2020	24	–	(24)	–	–	–
Scottish Government Digital Planning 2021	–	97	(64)	–	–	33
Julie Cowan Memorial Trust	–	40	(1)	–	–	39
Other	11	4	(8)	–	–	7
Planning Aid						
Grants and Donations	115	–	(5)	–	–	110
West Midlands Planning Aid	25	–	–	–	–	25
Gypsy and Traveller Training	7	–	–	–	–	7
Charity	583	141	(163)	(1)	(20)	540
Michael Welbank Fund	–	56	(4)	–	–	52
RTPI Trust General Fund	277	5	(2)	36	–	316
Group (Restated)	860	202	(169)	35	(20)	908

13. Outline summary of fund movements (continued)

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.

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.

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.

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 2021; 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 2021, but funds are being held against future training activities in the context of current and emerging legislation.

Scottish Government Digital Planning

These funds were granted in 2020 and 2021 for research projects into the 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 and 2022 to assist on the Scottish Government's National Planning Framework 4 initiative.

Julie Cowan Memorial Trust

These monies were received in 2021 to offer an annual £1k bursary for 40 years in memoriam to Julie Cowan.

Professor A Hall Legacy

This legacy was received in 2022 to fund a lecture series and bursaries.

14. Analysis of group net assets between funds

	General	Designated	Restricted	Total
	Fund	Funds	Funds	2022
	£'000	£'000	£'000	£'000
Fixed assets	–	3,356	–	3,356
Listed investments	3,417	–	322	3,739
Current assets	5,209	1,135	727	7,071
Current liabilities	(2,750)	(43)	–	(2,793)
Net assets	5,876	4,448	1,049	11,373

Prior Year Comparatives

Restated	General	Designated	Restricted	Total
	Fund	Funds	Funds	2022
	£'000	£'000	£'000	£'000
Fixed assets	–	1,383	–	1,383
Listed investments	3,881	–	332	4,213
Current assets	5,528	2,575	576	8,679
Current liabilities	(2,650)	(89)	–	(2,739)
Net assets	6,759	3,869	908	11,536

15. Investment in subsidiary company

The Institute holds 100% of the issued share capital of the 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 2022 RSL had debtors of **£2k (2021: £2k)** and cash at bank of **£9k (2021: £9k)**. Called up share capital was **£1k (2021: £1k)** and the profit and loss account balance was **£10k (2021: £10k)** giving total shareholders' funds of **£11k (2021: £11k)**. There was no trading activity in the year **(2021: none)**.

16. Operating leases

Charity and Group

Amount charged in the year

Leasehold property

Equipment

Total

2022

£'000

31

2

33

2021

£'000

30

1

31

Total commitment

Operating leases expiring within one year

Operating leases expiring between 2 and 5 years

Property	Equipment	Property	Equipment
2022	2022	2021	2021
£'000	£'000	£'000	£'000
	9	24	1
43	17	55	–
73	26	79	1

17. Prior year comparatives by class of fund

Charity statement of financial activities

YEAR ENDED 31 DECEMBER 2021

INCOME FROM:

Charitable activities

	Notes	General Fund £'000	Designated Funds £'000	Restricted Funds £'000	Total 2021 £'000
Membership subscriptions and fees		5,158	–	–	5,158
Grants and Sponsorship towards the promotion of spatial planning and membership		265	–	101	366
Support for members		1,119	–	40	1,159
Planning Aid		8	–	–	8
Investments	4	81	–	–	81
Total income		6,631	–	141	6,772

EXPENDITURE ON:

Charitable activities

Support for members and promotion of membership of the Institute		3,419	383	64	3,866
Promotion of spatial planning		2,333	37	94	2,464
Planning Aid		236	–	5	241
Total expenditure	5	5,988	420	163	6,571
Net income/(expenditure) before investment gains		643	(420)	(22)	201
Net gains/(losses) on investment assets		261	–	(1)	260
Net income/(expenditure)		904	(420)	(23)	461
Transfers between funds	13	(2,173)	2,193	(20)	–
Net movement in funds		(1,269)	1,773	(43)	461

Reconciliation of funds

Fund balances at 1 January		8,018	2,096	583	10,697
Fund balances at 31 December		6,749	3,869	540	11,158