



CANADIAN INSTITUTE OF PLANNERS | INSTITUT CANADIEN DES URBANISTES

*Shaping our Communities  
Sustaining Canada's Future* || *Bâtir nos communautés  
Pour un Canada viable*



# MEMBERSHIP CERTIFICATION STANDARDS FOR THE PLANNING PROFESSION IN CANADA

## FINAL REPORT AND RECOMMENDATION



Note: As a result of changes in CIP governance policy, the National/Affiliate Membership Committee has been renamed the National Membership Standards Committee (NMSC).

On July 8 and 9, 2010 the National Membership Standards Committee met to review the draft Task Force documents developed for the Planning for the Future Project and to consider feedback received from Members, CIP and Affiliate Councils and other stakeholder groups. Based on this review, modifications were adopted to a number of proposals contained in the reports. The National Membership Standards Committee has formally endorsed these reports, as revised, as final recommendations for consideration by CIP and Affiliate Councils to guide the development of by-law revisions to be voted on by the membership at large.

## **MODIFICATION OF THE CERTIFICATION STANDARDS FOR THE PLANNING PROFESSION IN CANADA REPORT**

Having considered the feedback received on the report, the National Membership Standards Committee has made the following changes to this report:

- Change name to National Membership Standards Committee
- p. 9, 10, 15, 16 and 17 - Modified 4.5 Professional Education Program, 4.5.4 Evaluation and Steps to Certification as a Professional Planner to change the Professionalism and Ethics course from a "pass" or "fail" to a "Satisfactory Completion" situation.



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## Membership Standards for the Planning Profession

In 2006, Affiliates and CIP considered the “Membership Continuous Improvement Project - New Horizons for the Profession Report”. This report identified a future vision for the profession and provided recommendations to reposition the profession to be more dynamic and relevant through enhanced standards, credibility, and ways and means to make best use of available resources.

There was unanimous agreement to pursue improvements, and the Planning for the Future/Membership Continuous Improvement Project (MCIP) was initiated. Leadership responsibility was assigned to the National Membership Standards Committee. Since that time, three task forces (Competency Standards, Ethical Standards and Certification Standards) have completed their work and provided reports to CIP and Affiliates, and recommended policies have been endorsed.

In order to effectively establish and implement administrative policy and procedures to support the certification policies, a Certification Operations Work Group was established. This group was charged with the responsibility of considering and acting upon comments received by affiliates, members, the National Membership Standards Committee, and related best practices in the implementation of certification related policy and procedures. The work of this group has resulted in changes to the membership manual to reflect new policies, supportive processes and procedures.

The National Membership Standards Committee has endorsed the proposed changes to the membership manual. Affiliates and CIP are being requested to provide an endorsement and proceed to adjust by-laws and policies and procedures, as required.

The members of the Certification Operations Work Group responsible for their outstanding work in addressing complex policy issues and developing practical solutions are:

Greg Hofmann, MCIP Chair	Misty Carson, MCIP MPPI Representative	Karen Russell, MCIP PIBC Representative
Dr. Jill Grant, FCIP API Representative	Jennifer Taylor APCPS Representative	David Crossley PIBC Staff
Claude Beaulac, MICU OUQ Representative	Marilyn Steranka APCPS Staff	Christine Helm CIP Staff
Charles Lanktree, MCIP OPPI Representative	David Klippenstein, MCIP AAICP Representative	Ronald M. Keeble, MCIP Competencies Task Force Chair
Mary ann Rangam OPPI Staff	MaryJane Alanko AAICP Staff	Jim Pealow Consultant/Facilitator

**Note:**

The existing Manual is to be amended. It will be renamed Membership Standards for the Planning Profession. The Table of Contents will be revised to include new and continuing policies. It will include:

**Volume 1 – Introduction, Membership and Standards**

Introduction

Update

Classes of Membership (minor adjustments will be required)

Affiliates

National Membership Standards Committee (minor adjustments will be required)

Professional Standards Board (new content re organization and relationships)

Fees

**Volume 2 – Competency Standards**

This section will be based on policy related content from the Competency Standards Report

**Volume 3 – Ethical Conduct Standards**

This section will be based on policy related content from the Standards of Ethical Conduct Report

**Volume 4 – Certification Standards – See Pages 6-13**

4.1 Becoming a Candidate

4.2 Accredited Degrees

4.3 Prior Learning Assessment and Recognition

4.4 Mentorship

4.5 Professional Education Program

4.6 Responsible Professional Planning Experience and Sponsorship

4.7 Professional Examination

4.8 Acceptance into Professional Membership

4.9 Transition

**Volume 5 – Accreditation Standards**

This section will be based on policy related content from the Accreditation Standards Report

**Volume 6 – Fellows Standards**

This section will be adjusted to reflect approved policy arising out of the Fellows Task Force Report

College

Committee

Nominations

**Volume 7 – Other Membership Standards**

Leave of absence

Transfer of membership

Non residents

Public associates

Honorary members

Other general policies



## Volume 4 – Certification Standards

Attached to this volume is information outlining paths and steps for certification.

### 4.1 Becoming a Candidate

In order to be accepted into the Candidate membership category, the applicant must:

- be employed in planning and;
- have completed a planning degree from a Professional Standards Board Accredited Planning School, or
- have a Professional Portfolio approved through the Prior Learning Assessment and Recognition policy and process, or
- be covered under a Professional Standards Board formal reciprocity arrangement with a professional planning organization;

### 4.2 Accredited Degrees

Accredited planning degrees are domestic and foreign degrees that have been approved through the Accreditation Program administered by the Professional Standards Board on behalf of the Affiliates. Requirements for accreditation are outlined in Volume 5 of the Membership Standards Manual. Non accredited degrees will be considered as part of the Prior Learning Assessment and Recognition policy and process.

### 4.3 Prior Learning Assessment and Recognition

Applicants for Candidate status may take the Prior Learning Assessment and Recognition route to professional certification. Applicants must have the equivalent of five years of responsible professional planning experience gained in a planning environment.

#### *Applicants for Candidate Status*

1. Must obtain information on the applicable PLAR requirements from the Professional Standards Board.
2. Must provide evidence of five years of responsible professional planning experience gained in a planning environment.
3. Must develop a PLAR Portfolio based on the information provided in the PLAR Portfolio Development Guide.
4. Based on the Competency Self-Assessment and Evidence Grid in the PLAR Portfolio Development Guide must identify educational and work experience that may need development with a mentor.
5. Must engage in educational or experiential development, if necessary, and update the PLAR Portfolio when the targeted development has been completed.
6. Must request a PLAR Portfolio Assessment by submitting the required documentation and remitting the required fee to the Professional Standards Board.
7. Upon notice of the assessment review, must complete additional educational and work experience as identified or, if the requirements have been met and candidate status has been approved, must proceed to complete: a minimum of one year mentorship and submit a signed Record of Mentorship; one year of responsible planning experience and submit a signed Record of Practical Work Experience; successfully complete the Ethics and Professionalism Course; and successfully complete the Professional Examination.



### *International Credentials*

1. Applicants with professional planning credentials from other professional planning organizations with which the Professional Standards Board has a formal arrangement will be accepted into candidate status. As candidates, they will proceed to complete: a minimum of one year mentorship and submit a signed Record of Mentorship; one year of Canadian responsible planning experience and submit a signed Record of Practical Work Experience; successfully complete the Ethics and Professionalism Course; and successfully complete the Professional Examination.
2. Applicants with international credentials from professional planning organizations other than those which the Professional Standards Board has a formal arrangement may demonstrate their knowledge and skills through the PLAR process, or present a degree from a planning school that has met the Planning Standards Board Accreditation Program requirements.
3. When an applicant is submitting foreign credentials, such credentials must be verified by an organization recognized by the Professional Standards Board. Organizations currently recognized include: Canadian Information Centre for International Credentials; and the International Qualifications Assessment Service. A copy of the certificate from the organization which provided verification must accompany the PLAR Portfolio.
4. Foreign planning degrees covered by formal arrangements with other professional planning organizations, or those that have been approved through the Accreditation Program administered by the Professional Standards Board will not require verification.

### *The Professional Standards Board will:*

1. Ensure information on the PLAR policies and processes are up-to-date and available on the Affiliate, CIP and Professional Standards Board websites.
2. Upon receipt of a PLAR Portfolio for assessment, assign two assessors to review the PLAR Portfolio in accordance with the Guidelines, Policies and Procedures for Assessors.
3. Names of assessors reviewing the PLAR Portfolio are not provided to the applicant.
4. Assessors may recommend that the applicant:
  - a. be accepted into candidate status and complete the candidate requirements; or
  - b. engage in additional development activities to meet specific educational or experience requirements.
5. In the event the two assessors disagree on the extent of eligibility and advanced standing, the PLAR Portfolio will be sent to a third assessor. Findings from the third assessor will stand and be reported.
6. Upon receipt of a PLAR Portfolio resubmission for assessment, assign one assessor to review the changes and confirm completion of the additional development activities. If the activities meet the requirements, the assessor may recommend the applicant be accepted into candidate status to complete the candidate requirements. If requirements are not met, information on development requirements will be provided to the applicant.
7. Allow up to three Portfolio submissions per applicant and establish the fee for PLAR Portfolio submissions. Any appeal by an applicant to have a fourth Portfolio submission will be forwarded to the Professional Education and Examination Committee (PEEC) for consideration.



## **4.4 Mentorship**

All candidates are required to participate in a mentorship requirement to support the practical work experience requirement. All candidates must complete a minimum of one year of mentorship. Upon being accepted as candidates, an information package on mentorship will be forwarded to the candidates. Within 90 days of being approved as candidates, the candidates will engage a mentor who has been a Registered Professional Planner (or Full Member under previous Membership Standards) in good standing for at least three years, and complete a Mentorship Agreement.

Mentors will receive from the candidates a copy of the Mentorship Guide and will sign the mentoring agreement. Candidates will sign a Mentorship Agreement with a mentor and complete the required mentorship period. Upon completion of the mentorship period, mentors sign a Record of Mentorship. When candidates submit an Application to Write the Professional Exam they will include a signed copy of the Record of Mentorship.

## **4.5 Professional Education Program**

### *4.5.1 Purpose & Scope*

The mandatory Ethics & Professionalism Course is an integral component of the evaluation of a candidate's qualification for Professional Membership. The purposes of the Ethics & Professionalism Course will be:

- To assist in preparing Candidates to successfully complete the Professional Exam
- To enhance and evaluate Candidates' understanding, comprehension, interpretation and ability to apply the Institute's Code of Ethics / Professional Conduct as well as broader issues of professionalism and related, relevant competencies for professional planners.

The Ethics & Professionalism Course final submission will be a suitable form of written submission, based on open-option questions/problems as may be determined by the Professional Education and Examination Committee (PEEC).

The development and maintenance of the mandatory Ethics & Professionalism Course will be the responsibility of the PEEC, working under the direction of the PSB, and in conjunction with Designated Examiners as required.

### *4.5.2 Eligibility & Enrollment*

All candidates are required to take and successfully complete the Professional Education Program. The current program consists of an Ethics and Professionalism Course. The course can be started any time after an applicant has been accepted into candidate status, and must be successfully completed before submitting an application to write the professional examination.

Eligibility will be restricted to Candidate members of the Institute in good standing.



Application and enrolment for a particular offering/sitting of the Ethics & Professionalism Course shall be through CIP, the Affiliate, or the PSB – depending on the arrangements and circumstances of that particular offering/sitting, as may be arranged.

The CIP, the Affiliate, or the PSB – as may be the case – will confirm the eligibility of any applicant for the Ethics & Professionalism Course with the applicable Affiliate prior to confirmation of their enrollment.

#### *4.5.3 Structure & Delivery*

The Ethics & Professionalism Course will be developed primarily as an online course (with the possibility/option of an in-person version where possible or desired), based on a series of modules, exercises to be completed, and a final submission to be formally evaluated.

All offerings/sittings of the Ethics & Professionalism Course (both online and in-person) will be suitably facilitated/supported by Designated Examiners.

Effective, consistent and regular delivery of the Ethics & Professionalism Course (both online and in-person) will be the responsibility of the PEEC (working through the PSB) and working closely in cooperation with CIP and Affiliates as appropriate and required.

The Ethics & Professionalism Course will be developed and offered in both English and French. Suitable policies and procedures will be developed by the PEEC with respect to accommodation for any Candidate(s) with special needs.

Fees charged for the Ethics & Professionalism Course (both online and in-person) will be set on a cost-recovery basis by the PEEC, with appropriate fee sharing with CIP and Affiliates, as required, determined and agreed upon.

The PSB/PEEC will develop, maintain and make available to eligible candidates materials and for those taking the Ethics & Professionalism Course.

#### *4.5.4 Evaluation:*

Evaluation of each candidate's completed submission from the Ethics & Professionalism Course shall be based on the Course Evaluation Guide developed and maintained by the PEEC.

Based on completion of assignments and the level of participation, candidates will be provided with a notice of "Satisfactory Completion".

In the event a candidate does not receive a Satisfactory Completion, the candidate's submission will receive a second review. In the event of a disagreement between the two reviews, the submission shall receive a third review for a final determination.

In the event of an unsatisfactory evaluation on any submission from the Ethics & Professionalism Course, the designated Reviewers will provide, in writing, brief comments/feedback identifying the conceptual



areas of weakness or deficiency identified during the evaluation. Such comments/feedback will be communicated to the candidate along with the evaluation results.

Candidates who do not receive a "Satisfactory Completion" on their submission are expected to take direction from the designated Reviewer comments/feedback, utilizing available resources to improve their preparation, and will be required to retake the Ethics & Professionalism Course.

Evaluation results from the Ethics & Professionalism Course will be communicated in writing to each candidate, following completion of the Course and the evaluation process, through CIP, the Affiliate, or the PSB – depending on the arrangements and circumstances of that particular offering/sitting, as may be arranged.

Appeals by candidates for the Ethics & Professionalism Course must be made in writing to the PEEC within a prescribed period of time following the receipt of the final result by the candidate, as determined by the PEEC. The PEEC or PSB may require and prescribe payment of a fee associated with any appeal. In the case of an appeal, the Appeal Committee of the PSB would review the candidate's original completed submission from the Ethics & Professionalism Course and the subsequent evaluation, and make a firm and final determination.

Appeal results from the Ethics & Professionalism Course will be communicated in writing to each candidate, following completion of the appeal evaluation process, through CIP, the Affiliate, or the PSB – depending on the arrangements and circumstances, as may be arranged.

Candidates will be normally limited to three attempts at Satisfactory Completion of the Ethics & Professionalism Course during their respective (limited) time as a Candidate member of the Institute. Any additional attempts shall only be permitted at the discretion of the PEEC, upon written appeal by the candidate in question.

#### **4.6 Responsible Professional Planning Experience and Sponsorship**

All candidates must meet the responsible professional planning experience requirements.

Responsible Professional Planning Experience" means work;

- a) comprising analysis, projection, design or program development which specifically requires consideration of the inter-relationships of space and time among resources, facilities and activities, and which expresses this consideration in a manner to influence the disposition of land or the allocation of resources, facilities or services;
- b) which shows a specific relationship to public policies or programs for controlling or influencing the development of communities;
- c) which comprises a substantive component of initiative, judgment, substantial involvement and personal accountability or definition or preparation of significant elements of the program of work.

Technical, clerical or administrative work performed in support of the planning function shall not be considered responsible professional planning experience.



Requirements to demonstrate responsible professional planning experience are:

- Candidates with a degree in planning from a Professional Standards Board Accredited Planning School must obtain and demonstrate the equivalent of two years of responsible professional planning experience gained in a planning environment.
- Candidates with an approved PLAR Portfolio must obtain and demonstrate the equivalent of one year of responsible professional planning experience gained in a planning environment. The one year experience is in addition to the minimum of five years of responsible professional planning experience required to have PLAR Portfolios considered.
- Candidates with international credentials recognized by the Professional Standards Board must obtain and demonstrate the equivalent of one year of responsible professional planning experience gained in a planning environment.
- Candidates will complete a Record of Practical Work Experience and arrange for a sponsor with more than three years as a professional planner to sign the document, indicating that requirements have been met.
- Candidates will provide the sponsor with a copy of the Sponsors' Guide.
- When candidates submit an Application to Write the Professional Exam they will include a signed copy of the Record of Practical Work Experience.

## **4.7 Professional Examination**

### *4.7.1 Purpose and Scope*

The Professional Examination is an integral component of the evaluation of a Candidate's qualification for professional membership, and is the final step in the Professional Member certification process. The purposes of the Membership Professional Examination will be:

- To assist in assessing Candidates' suitability for admission to Professional Membership
- To evaluate Candidates' understanding, comprehension, interpretation and ability to apply the Institute's Code of Ethics / Professional Conduct as well as broader issues of professionalism and related, relevant competencies for professional planners.
- The Professional Examination submission will be a suitable written form exam based on closed-option questions/problems as may be determined.
- The development and maintenance of the Professional Examination will be the responsibility of the PEEC, working under the direction of the PSB, and in conjunction with Designated Examiners as required.

### *4.7.2 Eligibility and Enrollment*

Eligibility will be restricted to Candidate members of the Institute in good standing who have successfully completed: the Ethics & Professionalism Course; a minimum of one year mentorship and submitted a signed Record of Mentorship; one year or more years of responsible planning experience, depending on the access route, and submit a signed Record of Practical Work Experience; and completed the Application to Write the Professional Examination.



Application and registration for a particular offering/sitting of the Professional Examination shall be through CIP, the Affiliate, or the PSB – depending on the arrangements and circumstances of that particular offering/sitting, as may be arranged.

CIP, the Affiliate, or the PSB – as may be the case – will confirm the eligibility of any applicant for the Professional Examination with the applicable Affiliate prior to confirmation of their enrollment.

#### *4.7.3 Structure and Delivery*

The Professional Examination will be developed as an in-person paper examination (with the future possibility of a computerized or online version where possible or desired – provided adequate provisions for exam security, integrity & supervision can be addressed), based on a series of closed-option questions (multiple choice, true/false, single-word fill-in-the-blank, etc.).

The Professional Examination will comprise three equal basic sections which:

- Pose various scenarios related to ethics & professionalism;
- Test knowledge of the Institute’s Code of Ethics / Professional Conduct;
- Assess comprehension & understanding of relevant competencies and broad concepts of professionalism & ethics.

The Professional Examination will consist of questions drawn from the “Exam Bank” of potential questions, as determined by the PEEC, which shall vary for each offering/sitting of the Exam. A corresponding Evaluation Guide for each version of the Professional Examination shall be developed by the PEC along with each version of the Exam.

Two versions of the Professional Examination will be developed for each offering/sitting – a primary version and a “back-up” version in case of a breach in the security or integrity of the primary version during the offering/sitting.

The Professional Examination will be designed & structured to be equivalent to a three to four hour exam.

Effective, consistent and regular delivery of the Professional Examination will be the responsibility of the PEEC (working through the PSB) and working closely in cooperation with CIP and Affiliates as appropriate and required.

The Professional Examination will be developed and offered in both English and French. Suitable policies and procedures will be developed by the PEEC with respect to accommodation any Candidate(s) with special needs.

The Professional Examination shall be offered (or sat) twice each calendar year (generally once every spring and fall), in centers across Canada as determined collaboratively between the PEEC/PSB, CIP and Affiliates.

The Professional Examination will be the same exam across Canada at each offering/sitting, and delivered on the same date, at the same time, in the same fashion.



All offerings/sittings of the Professional Examination will be suitably supervised or proctored as arranged by CIP and or Affiliates as appropriate.

The PEEC/PSB will work with Affiliates and CIP with respect to the logistics and administration of the delivery of each offering/sitting of the Professional Examination, with CIP and or Affiliates (as appropriate) acting as the primary delivery point for the exam.

The PEEC/PSB will develop and provide suitable, consistent procedures, instructions, and guidelines/materials for Affiliates and CIP with respect to the delivery & supervision/proctoring of offerings/sittings of the Professional Examination.

Names of candidates approved to write the professional examination are forwarded by the Affiliates to the Professional Standards Board.

Affiliates will provide approved candidates with a copy of the Examination Instructions along with other related examination information (date, location, or invigilator arrangements). Affiliate staff or volunteers will administer the delivery of the examination sitting and forward the exams to the Professional Standards Board.

Fees charged for the Professional Examination will be set on a cost recovery basis by the PEEC, with appropriate fee sharing with Affiliates and CIP, as required, determined and agreed upon.

The PSB/PEEC will develop, maintain and make available to eligible candidates preparatory materials and preparation guidelines for those preparing to undertake the Professional Examination.

#### *4.7.4 Evaluation*

Evaluation of each candidate's completed submission from the Professional Examination shall be based on the corresponding Professional Examination Evaluation Guide developed and maintained by the PEC.

Each candidate's completed submission shall be initially independently evaluated by two Designated Examiners who will individually determine a score based on the corresponding Professional Examination Evaluation Guide.

A minimum score of 80% will be required as a passing grade on the exam.

In the event of a disagreement between the resulting scores of the initial two Designated Examiners on any submission (or any other evaluation dispute), the submission shall be independently evaluated by an additional (third) Designated Examiner for a final determination.

In the event of a failing evaluation on any Professional Examination submission, the Designated Examiners will provide, in writing, brief comments/feedback identifying the conceptual areas of weakness or deficiency identified during the evaluation. Such comments/feedback will be communicated to the candidate along with the evaluation results.



Candidates who receive a failing score on their Professional Examination submission are expected to take direction from the Designated Examiner comments/feedback, utilizing available resources to improve their preparation, *and may be required to retake the Mandatory Ethics & Professionalism Course.*

Evaluation results from the Professional Examination will be communicated in writing to each candidate, following completion of the exam and the evaluation process, through the PSB or the Affiliate – depending on the arrangements and circumstances of that particular offering/sitting, as may be arranged.

Appeals by candidates of a failing result from the Professional Examination would be made in writing to the PEEC within a prescribed period of time following the receipt of the final result by the candidate, as determined by the PEEC. The PEEC or PSB may require and prescribe payment of a fee associated with any appeal. In the case of an appeal, the Appeal Committee of the PSB would review the candidate's original completed Professional Examination submission and the subsequent evaluation/markings, and make a firm and final determination.

Appeal results from the Membership Professional Examination will be communicated in writing to each candidate, following completion of the appeal evaluation process, through CIP, the Affiliate, or the PSB – depending on the arrangements and circumstances, as may be arranged.

Candidates will be normally limited to three attempts at successful completion of the Membership Professional Examination during their respective (limited) time as a Candidate member of the Institute. Any additional attempts shall only be permitted at the discretion of the PEC, upon written appeal by the candidate in question.

#### *4.7.5 The Exam Bank*

The PEEC/PSB will develop and maintain a suitable pool of potential exercises/problems for the Mandatory Ethics & Professionalism Course (and corresponding answers/solutions and evaluation guidelines); as well as a suitable pool of exam questions (and corresponding answers/solutions and evaluation guidelines) for the Professional Examination – The Exam Bank.

Suitable exercises/problems/questions and related answers/guidelines would be developed, tested and reviewed by the PEEC prior to inclusion in the Exam Bank.

The content of the exercises/problems/questions and related answers/guidelines in the Exam Bank shall be confidential.

Following the initial development of the Exam Bank, the questions and related answers/guidelines in the exam bank would be comprehensively reviewed and updated by the PEEC a minimum of every three years, with the revision of existing exercises, problems, and questions, the addition of new exercises, problems, and questions, and removal of exercises, problems, and questions, as appropriate.

## **4.8 Acceptance into Professional Membership**

All candidates accepted into professional membership shall be formally approved by an Affiliate Council.



Upon successful completion of the professional examination by candidates, Affiliate staff or volunteers will formally present the candidates' names to the Affiliate Council for approval. Upon approval, the Affiliate will send a congratulatory letter, along with information regarding a recognition event and other information required to develop a relationship with the new professional.

#### **4.9 Transition**


It is anticipated that on April 30, 2011 new standards will be in effect. On April 30, 2011, the membership category "Provisional Member" will change to "Candidate Member" and individuals in the "Provisional Member" category will become "Candidate Members".

Individuals who were provisional members prior to April 30, 2011 will be eligible to complete certification under the new requirements or meet the following transitional criteria:

- Provisional members in good standing as of April 30, 2011, will have until April 30, 2014 to complete their certification based on standards in place as of April 30, 2011. During this period experience may include any and all relevant recognized professional planning experience obtained by the provisional member.
- After April 30, 2014 individuals who were provisional members prior to April 30, 2011 and have not become full members will be required to complete certification based on the new requirements in place on April 30, 2011.



## Steps to Certification as a Professional Planner

						
<b>Apply for Candidate Status</b>	<b>Candidate Status Awarded</b>	<b>Meet Mentorship Requirements</b>	<b>Satisfactorily Complete Ethics and Professionalism Course</b>	<b>Meet Practical Work Experience and Sponsorship Requirements</b>	<b>Pass Professional Examination</b>	<b>Professional Status Granted by Council</b>

Activity in the steps will vary depending on the pathway to certification. The details for the CIP Accredited Planning Degree path and the Non CIP Accredited Planning Degree path follow:

### Steps to Certification - Applicant with a CIP Accredited Planning Degree

#### 1. Apply for Candidate Status

- The applicant submits an application for candidate status to the Professional Standards Board (PSB). The application must include: transcripts, proof of graduation, employment in planning information along with required fees.  
{Note: alternatively, an affiliate may choose to serve as the first point of contact for the individual and submit the completed application along with all required fees and documentation to the PSB office.}
- If additional information is required, or an applicant is ineligible, the applicant is notified accordingly.

#### 2. Have Candidate Status Awarded

- When an applicant is eligible for candidate status, the PSB provides notification to the applicant and the applicable affiliate. The applicant is directed to pay affiliate membership dues and become a candidate member.
- Upon payment of dues and acceptance as a candidate, he/she will be directed to additional information concerning mentorship, work experience, sponsorship, the ethics and professionalism course and the professional exam.

#### 3. Meet Mentorship Requirements

- The candidate engages a mentor who has been a Registered Professional Planner (or Full Member under previous Membership Standards) in good standing for at least three years, and completes a mentorship agreement within 90 days of being approved as a candidate.
- After one year of mentorship, the candidate has the mentor sign the Record of Mentorship. This document is to be submitted with the Application to write the Professional Exam.



#### **4. Satisfactorily Complete Ethics and Professionalism Course**

- The candidates can enroll in this course any time after being accepted as a candidate. Candidates unable to satisfactorily complete this course will be limited to three attempts.

#### **5. Meet Practical Work Experience and Sponsorship Requirements**

- The candidate must obtain and demonstrate the equivalent of two years of responsible professional planning experience gained in a planning environment. Experience gained prior to being a candidate member may be eligible. When the requirement has been met, the candidate completes a Record of Practical Work Experience and arranges for a sponsor with more than three years' experience as a professional planner to sign the document. This signed document is to be submitted with the Application to write the Professional Exam.

#### **6. Pass Professional Examination**

- Candidates who have met the requirements for mentorship, work experience and sponsorship and the ethics and professionalism course may apply to write the professional exam.
- Candidates must successfully pass the exam.

#### **7. Professional Status Granted by Council**

- The names of candidates who have successfully passed the exam will be forwarded to the applicable affiliate council for approval.

### **Steps to Certification - Applicant with a Non-CIP Accredited Planning Degree (PLAR)**

#### **1. Apply for Candidate Status**

- The applicant submits an application for candidate status to the Professional Standards Board (PSB). The applicant must have a minimum of five years of responsible professional planning experience. The application must include a portfolio based on PLAR policy and guidelines, along with required fees.  
{Note: alternatively, an affiliate may chose to serve as the first point of contact for the individual and submit the completed application along with all required fees and documentation to the PSB office.}
- If additional information is required or an applicant is ineligible, the applicant is notified accordingly.

#### **2. Have Candidate Status Awarded**

- When an applicant is eligible for candidate status, the PSB provides notification to the applicant and the applicable affiliate. The applicant is directed to pay affiliate membership dues and become a candidate member.
- Upon payment of dues and acceptance as a candidate, he/she will be directed to additional information concerning mentorship, work experience, sponsorship, the ethics and professionalism course and the professional exam.



### **3. Meet Mentorship Requirements**

- The candidate engages a mentor with more than three years' experience as a professional planner, and completes a mentorship agreement within 90 days of being approved as a candidate.
- After one year of mentorship, the candidate has the mentor sign the Record of Mentorship. This document is to be submitted with the Application to write the Professional Exam.

### **4. Satisfactorily Complete Ethics and Professionalism Course**

- The candidate can enroll in this course any time after being accepted as a candidate. Candidates unable to satisfactorily complete this course will be limited to three attempts.

### **5. Meet Practical Work Experience and Sponsorship Requirements**

- The candidate must obtain and demonstrate the equivalent of one year of additional responsible professional planning experience gained in a planning environment. This experience may be gained during the required mentorship period. When the requirement has been met, candidates complete a Record of Practical Work Experience and arranges for a sponsor with more than three years' experience as a professional planner to sign the document. This signed document is to be submitted with the Application to write the Professional Exam.

### **6. Pass Professional Examination**

- Candidates who have met the requirements for mentorship, work experience and sponsorship and the ethics and professionalism course may apply to write the professional exam.
- Candidates must successfully pass the exam.

### **7. Professional Status Granted by Council**

- The names of candidates who have successfully passed the exam will be forwarded to the applicable affiliate council for approval.

