



CANADIAN INSTITUTE
OF PLANNERS

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A PROPOSAL TO ESTABLISH A PROFESSIONAL STANDARDS BOARD FOR THE PLANNING PROFESSION IN CANADA

Creating a Shared Service Vehicle to Support Quality

FINAL REPORT AND RECOMMENDATION

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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 PROPOSAL TO ESTABLISH A PROFESSIONAL STANDARDS BOARD FOR THE PLANNING PROFESSION IN CANADA

Having considered the feedback received on the Ethical Standards Report, the National Membership Standards Committee has made no modification to this report.

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

- Affiliate/National Membership Committee name has been changed to National Membership Standards Committee
- Page 8 - Chairs of committees and task forces will now be determined by the PSB Board.
- Page 8 - Accreditation Program Committee composition has been changed
- Page 10 - The Professionalism and Ethics Course changes from a "pass" or "fail" to a "Satisfactory Completion" situation
- Dates have been changed to reflect a new start date of April 30, 2011
- Page 15 - Accreditation assumptions have changed to provide for a transition period moving from recognition to accreditation



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A. Introduction

The Canadian Institute of Planners and the Affiliate Institutes initiated the Planning for the Future Project to review membership standards, practices and related policies. It has been almost twenty five years since membership standards were last reviewed. This review is timely as some Affiliate organizations are experiencing significant budget and volunteer resource challenges in attempting to administer membership processes.

Changes in the external environment, including new legislation and policy initiatives on the part of provincial governments, have also had an impact on the realm of planning practice and the competencies that will be required of a professional planner. International and inter-provincial trade agreements that require reductions of trade barriers to labour mobility and clear, transparent processes for credential transportability are now also a reality.

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

Deliverables from the project indicated opportunities for the profession to advance itself reputationally, organizationally, administratively and legislatively, in relation to the Agreement on Internal Trade. In turn, the profession will be considered “state of the art”. The profession and its members will be more proactive and able to respond to challenges from professional environments. Members will connect with the new level of quality being advanced and will be proud to be members.

The Management of the the Planning for the Future Project (PFF) (formerly known as the Membership Continuous Improvement Project (MCIP) has been delegated to the National/Affiliate Membership Committee.

There was unanimous agreement to make improvements, and the Planning for the Future (PFF) was initiated. The project mandate is to:

1. Determine appropriate competencies for a professional planner, and processes for keeping them relevant as the profession moves forward.
2. Identify ways and means of addressing external and internal challenges and respond appropriately.
3. Identify and recommend improvements to the membership process that will serve the profession and its future members.
4. Develop new policy and processes to allow Affiliates and CIP to continue to meet the expectations of their constituents and their mandates both now and into the future.

Leadership responsibility was assigned to the Affiliate/National Membership Committee. Since that time, three task forces (Competency Standards, Ethical Standards and Certification Standards) have completed their work and provided reports to Affiliates and CIP, and recommended policies have been endorsed.



A Certification Operations Working Group was struck to address operational aspects of the endorsed policies, focusing on supportive structure, processes, procedures and administrative policy. The group has identified the ways and means to successfully implement the new policies.

Subsequently, an Accreditation Task Force was also created to advise the project team on planning program accreditation processes.

Accordingly, recommendations are presented for consideration. Should the recommendations be accepted, the target date for implementation of the new certification requirements will be April 30, 2011. Existing provisional members would have until April 30, 2014 to complete certification under the current arrangements.

B. Preferred Situation and Issues

As the work of the Committee and its task forces progressed, it became clear that it was not business as usual. Consideration of better practices, international standards and the increased use of technology suggested there are other ways to structure and administer professional standards.

Benchmarking of possible arrangements was undertaken. It was noted that a number of professional groups, where right to title or other legislation is in place, often have an independent certification council or board; accreditation council or board; certification and accreditation council or board; examination board; college; or some other group established to administer professional standards. For example, Engineers Canada has an Accreditation Board that accredits undergraduate engineering programs that provide the academic requirements necessary for licensure as a professional engineer in Canada. It also has a Canadian Engineering Qualifications Board that is responsible for the Engineers Canada examination and develops national guidelines on professional engineering qualifications, standards of practice, ethics and professional conduct.

The current arrangements used by Affiliates and CIP are not keeping pace with changes made and underway when compared to other professional groups.

The preferred situation identified was to establish a responsible body with a significant level of independence that could administer assigned standards on behalf of Affiliates and CIP. Interest in and understanding of the need for an independent body was high since delivery of consistent national standards, given due regard to size of the organization, and economies of scale, would make best use of resources, support labour mobility and promote overall quality.

While it is possible to set up several independent boards to conduct the work envisioned, it was also recognized that the volume and membership numbers did not warrant going beyond a consolidated board.

The Professional Standards Board (PSB), or the possible full name, Professional Standards Board for the Planning Profession in Canada, was chosen for this body.

The Certification Operations Working Group developed assumptions based on the preferred situation for the planning profession in Canada. Some of the key assumptions are:

- The PSB will be an independent group established by Affiliates and CIP and will be populated with qualified representatives from Affiliates and CIP.
- The PSB will administer certain standards and operations pertaining to certification and accreditation, as approved by the National/Affiliate Standards Committee.
- The administration will include: meeting candidate standards for regular and PLAR applicants; Ethics and Professionalism Online Course; the professional examination; and accreditation reviews and awards. There will be internal structures and policy to manage the processes.
- The services provided by the PSB would be on a user pay and cost recovery basis.



Based on these assumptions, some of the key issues to be considered as part of establishing a PSB are:

1. What will be the mandate and terms of reference?
2. Should the PSB be set up within CIP or as an independent, not-for-profit corporation?
3. How can we make best use of technology to support the PSB?
4. Can we meet the ISO standards for professional groups?
5. Who will be on the board and how is accountability achieved?
6. Can the board recommend standard changes to the National Membership Standards Committee?
7. Will a shared service agreement be required by all those participating?
8. What internal committee structures will be required?
9. How will administration of the PSB's activities occur?
10. How will finances be structured?
11. What internal policies will be required?

The issues are broken down into two main areas: Mandate and Structure, and Operations. They are dealt with in the following sections.

C. Mandate and Structure

The Professional Standards Board's (PSB) mandate is to provide leadership in the development and delivery of assigned national standards to support the planning profession in Canada. The PSB mandate is captured through the following statement:

The Professional Standards Board is to administer the following responsibilities as an independent organization operating at arm's length from the National Membership Standards Committee, Affiliates and CIP:

Candidate Assessment

- Assess and report on an applicant's eligibility for candidate status in accordance with the National Standards Manual – Certification, approved by the National Membership Standards Committee.
- Hear appeals.

Online Ethics and Professionalism Course

- Develop and maintain a quality online Ethics and Professionalism Course in accordance with the National Standards Manual - Certification approved by the National Membership Standards Committee.
- Accept enrolments and arrange for delivery of the course.
- Provide candidates with results on their participation in the course.
- Hear appeals.

Professional Examination

- Develop, deliver and maintain a quality professional examination in accordance with the Standards Manual - Certification approved by the National Membership Standards Committee.
- Ensure appropriate policies, procedures, guidelines, resources, and other materials are in place and/or available, as required, for the effective and successful delivery of the professional exam.
- Ensure the regular, consistent, and timely delivery and evaluation of sittings of the professional examination.
- Hear appeals.

Accreditation Program

- Oversee policy and procedures for delivery of the Accreditation Program in accordance with the National Standards Manual – Accreditation, approved by the National Membership Standards committee.
- Promote accreditation as an asset to the planning profession.
- Review applications and determine eligibility requirements for accreditation.



- Provide Affiliates and CIP with current information on accreditation status and information on the program.
- Approve selection criteria for reviewers, and recruit, train and administer volunteer reviewers.
- Conduct reviews of annual reporting forms and site visits. Prepare reports and determine accreditation awards.
- Hear appeals.

Based on the preceding mandate, the structure used to support the mandate needs to reflect a governance arrangement that can accommodate the interests of key stakeholders in a federation style arrangement. The governance arrangement most likely to be successful involves the following:

Members

- Board members will be the members of the PSB organization. Annual and special general meeting requirements will be those as required in the Canada Not-for-Profit Corporations Act.

Board

- The board composition will include up to eight individuals.
- Affiliates and CIP will each nominate at least one qualified representative to serve on the board.
- Individuals will be appointed for three-year terms, except in the case of the founding arrangement. For the founding board, four individuals will be appointed to three-year terms; four appointed to two-year terms; and two appointed to a one-year term.
- Individuals can serve two three-year terms on the board and committees and must then sit out for a three-year term.
- The chair and vice-chair of the board will be selected annually by members of the board.
- The board will meet at least twice a year in person and, as required, using other means.
- To assist the board in its work, volunteer standing committees, ad-hoc committees and task forces may be utilized to handle special projects.
- Chairs of committees and task forces will be determined by the Board of the PSB and will not be members of the PSB.
- It is expected that there will be two standing committees: the Accreditation Program Committee, and the Professional Education and Examination Committee. An ad-hoc committee of the board will handle appeals. Responsibilities not specifically assigned to these committees will be handled directly by the board or delegated, if necessary.

Professional Education and Examination Committee (PEEC)

- The Professional Education and Examination Committee (PEEC) will include one member of the PSB and six qualified representatives from affiliates.
- The term for members of the committee will be three years, except in the founding year when some of the PSB members may only be able to serve a one-year or two-year term.



- The committee will meet at least once each year in person and, as required, using other means. The PEEC in person meeting will precede or follow a PSB meeting.
- Additional information on the PEEC is available in Appendix A.

Accreditation Program Committee (APC)

- The Accreditation Program Committee (APC) is made up of one member of the PSB board, a minimum of three affiliate representatives and three ACUPP/Academic Representatives, all of whom must be Members in good standing of the Institute and meet the qualifications as set out, as well as, consider regional/ gender balance.
- The term for members of the committee will be three years, except in the founding year when some of the PSB members may be only able to serve a one-year or two-year term.
- The committee will meet at least once each year in person and, as required, using other means. The APC in person meeting will precede or follow a PSB meeting.

Relationships

- The PSB will be responsible to implement the standards delegated by the National Standard Committee which have been approved by Affiliates and CIP.
- The National Membership Standards Committee will undertake fixed reviews of standards for the profession and the PSB will be invited to participate in these reviews.
- The PSB Chair will sit on the National Membership Standards Committee in an ex-officio non-voting capacity. The PSB staff resource will also participate on the National Membership Standards Committee in an ex-officio non-voting capacity.
- Affiliates and CIP will nominate members of the PSB.
- Affiliates and CIP will receive services from PSB and service agreements will be used to cover scope, reporting and other service expectations.
- Affiliates and/or CIP and/or an association management company will have a contractual arrangement with the PSB, to provide administrative and program support.
- Affiliate and CIP staff responsible for certification matters will serve as an advisory resource to the PSB.
- Volunteers with the PSB board, committees or as candidate, accreditation or exam reviewers and instructors will have links to affiliates and, through development opportunities, will hopefully become future leaders in the planning profession.

Policies

- By-laws and policies will be required to support the mandate and structure and operations. Common governance policies will be developed to support the mandate and operations of the PSB.

Appendix B includes an organization chart illustrating the structure proposed.



D. Operations

Based on the mandate and structure recommended, the PSB will require administrative support for its operational activity to successfully deliver services.

The services will involve activity in the following areas:

1. Candidate assessment
2. Development and delivery of the online Ethics and Professionalism Course
3. Development, review and administration of the Professional Examinations
4. Delivery of the Accreditation Program
5. Administrative Support for governance and operations

A flow chart and a diagram in Appendix C provide an overview of some of the operational activity and steps to certification. A listing of activity by key area follows:

1. Candidate Assessment

Planning Degree Route

- Individuals eligible for the regular route will submit their application to become a candidate to the PSB office, along with their transcripts and proof of graduation from an accredited planning school, payment of dues, as required, and employment in planning. {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.}
- Information submitted will be reviewed by a staff member or volunteer in accordance with the requirements for this route.
- Staff and/or a volunteer will request additional information as required.
- The individual will provide additional information, as required.
- Staff and/or a volunteer will confirm that requirements have either been met or have not been met.
- In the case of requirements not being met, notification will indicate why and provide options, if applicable.
- Once requirements have been met, the PSB will notify the individual and the Affiliate in writing.
- Upon payment of membership dues and acceptance into candidate status by the Affiliate, the Affiliate will provide the candidate with an Information Package on Mentorship and Practical Work Experience; enrolment information on the Ethics and Professionalism Course; information as to how to apply to write the Professional Examination; and other information required to become a professional planner.

PLAR Route

- Individuals wishing to use the PLAR route will submit their portfolio and required fees to the PSB office. {Note: alternatively, an Affiliate may choose to serve as the first point of contact for the individual and submit the portfolio along with all required fees to the PSB office.}

- The portfolio will be reviewed in accordance with requirements of the PSB's PLAR policy and procedures.
- Staff will request additional information as required.
- Staff will confirm whether or not requirements have been met. In the case of requirements not being met, notification will indicate why and provide options, if applicable.
- Once the portfolio has been approved, the PSB will notify the individual and the Affiliate in writing.
- Upon payment of membership dues and acceptance into candidate status by the Affiliate, the Affiliate will provide the candidate with an Information Package on Mentorship and Practical Work Experience; enrolment information on the Ethics and Professionalism Course; information as to how to apply to write the Professional Examination; and other information required to become a professional planner.

2. Development and Delivery of the Online Ethics and Professionalism Course

All candidates are required to take and successfully complete the Ethics and Professionalism Course. The course can be started any time after a candidate has been accepted, and must be completed before submitting an application to write the professional examination.

- Candidates complete and send in the course enrolment form, along with the course fee, to the PSB. Staff will send a course password and course information to the candidate.
- Based on completion of assignments and the level of participation, candidates will be provided with a notice of "Satisfactory Completion".
- The PSB will advise the Affiliate as to those candidates receiving a "Satisfactory Completion" notice.
- PSB staff will also provide candidates with a reminder regarding Mentoring and Work Experience required prior to applying to write the professional examination.

3. Professional Examination

All candidates must write the Professional Examination.

- The PSB arranges for development of the professional examination, maintains an exam bank and ensures appropriate policies, procedures, guidelines, resources, and other materials are in place and/or available, as required, for the effective and successful delivery of the professional exam.
- The PSB sets the dates and times for the professional examinations and ensures integrity, consistency, quality and relevancy of the professional examinations.
- Names of the candidates approved to write the professional examination are forwarded to the PSB by Affiliates.
- Affiliates and the PSB will provide approved candidates with a copy of the Examination Instructions, along with other related examination information (date, location, or invigilator arrangements).
- The Affiliate staff or volunteers administer delivery of the examination sitting and forward exams to the PSB.



- The PSB arranges for a review of completed examinations and administers appeals, as appropriate.
- The PSB submits results to the candidates and a copy is sent to the Affiliates.

4. Accreditation Program Delivery

The PSB is responsible for accreditation matters for the planning profession in Canada. It:

- applies principles approved by the National Membership Standards Committee in the interpretation and development of policy and procedures to support the Accreditation program;
- approves selection criteria for reviewers;
- provides Affiliates and CIP with current information on accreditation status, and information on the program;
- promotes accreditation as an asset to the planning profession;
- reviews applications and determines eligibility requirements for accreditation;
- establishes review teams and site visits;
- prepares reports and determines accreditation award; and
- reviews annual reporting forms.

5. Administrative Support

Governance and operations of the PSB require administrative support which includes necessary staff, facilities, equipment, processes and financial policies.

The Certification Operations Working Group agreed that the PSB should be incorporated and then looked at the advantages and disadvantages of the options available to obtain administrative support. Options considered were:

Option 1 – Administrative Support from CIP

In this option, an incorporated PSB uses CIP to provide administrative support.

Option 2 – Administrative Support from an Affiliate

In this option, an incorporated PSB uses an Affiliate to provide administrative support.

Option 3 – Administrative Support from an AMC

In this option, an incorporated PSB contracts with an Association Management Company to provide administrative support.

Option 4 – Internal Administrative Support

In this option, an incorporated PSB engages its own staff to provide administrative support.

The Certification Operations Working Group concluded that, at the outset at least, Option 1 should be considered. Once operational, the PSB would then be in a better position to determine for itself the best option regarding administrative support. It may choose to continue with Option 1, choose another option or choose a combination of the options listed.

If Option 1 is used at the outset, a services agreement between the PSB and CIP will be required. The agreement will indicate the levels and types of support for PSB, along with financial arrangements. CIP has some existing administrative and financial policies that can be adapted for use by the PSB.

A key assumption for PSB operations is that delivery of services will be on a cost-recovery basis and pricing will be on a user pay basis. The main costs for the PSB will include:

- governance of the board and committees;
- administrative support contract (staff, technology, space, overheads, etc.);
- service delivery costs for personal services provided (honourariums and fees for: exam development; candidate reviews; course instructor delivery; exam reviews, and accreditation reviews); and
- service delivery costs for support expenses (marketing and communications, travel, shipping, etc.).

Without a history of volume and cost or an accurate forecast, a best estimate will have to be determined by the PSB to set pricing for services. Over or under amounts can be adjusted on an annual basis or sooner, if required.

A shared services agreement between the PSB and Affiliates will outline service expectations and fees.

In order to have sufficient start-up funds for preparations and final developments, and operating cash, it will be necessary for the PSB to receive start-up funding from its members. The amount of start-up funding is to be determined when forecasted volumes are received. Very serious consideration should be given to recovering all of the PSB's start up costs in the fees the PSB charges for the services it provides once operational unless another arrangement is determined regarding start-up funding.

The start up costs for 2011 will include costs not covered under the Planning for the Future Project. These costs will be for:

- Board and committee planning and orientation
- Course development for online delivery
- Development of exams and a bank of questions
- Accreditation Program volunteer recruitment and training
- Assessment of school programs to competencies
- Finalized detailed forms, process and technology
- Initial staffing and other administrative supports

It is possible that some of these costs may be covered from surplus funds, if any, from the Planning for the Future Project.



The PSB will be officially operational in 2011. While it will be operational, the volume of activities will be low based on the following assumptions:

Certification

- 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. Existing provisional members may perceive the new standards tougher in terms of achieving certification and will rush to complete certification under the existing arrangements. With this assumption, the number of exam writers, candidates taking the Ethics and Professionalism course and candidate assessments during 2011 will be low.
- There are 1,900 provisional members as of January 1, 2010, with another 400 expected to join in 2010 and 400 to become full members. Of these members, it is estimated that at least thirty percent do not have a degree in planning. Those members not able to complete under the existing program by April 30, 2014 will be required to meet the requirements under the new program. An assumption is made that most will meet the deadline.
- In 2011 and the years there after, there will be an estimated 400 individuals wishing to pursue a professional designation in planning. Of these, only seventy percent will most likely be approved for candidate status as they will have an accredited or recognized degree in planning. The other 30 percent will need to qualify under the PLAR route. Therefore there will be up to 280 applicants able to move forward with the course, engage in mentoring, meet the practical work experience and write the exam.
- In 2011, the first online course will commence in April, 2011, and will be offered again in September, 2011. There is a potential for 80 or more course enrollments in 2011.
- Due to the 1 year mentorship requirement, it is expected there will be very few exam writers and no exam offered in 2011. The first regular professional examination will occur in the spring of 2012.
- The PSB will meet twice in person and twice by conference call in 2011.

Table 1 – Course Enrollments

Course Enrollments	2011	2012	2013	2014
Provisional - Planning Degree (1)	0	0	0	102
Former Provisional – Other degree (1)	0	0	0	50
Candidates– Planning Degree (2)				
2011 Intake	56	112	112	
2012 Intake		56	112	112
2013 Intake			56	112
2014 Intake				56
Candidates – PLAR (3)				
2011 Intake	24	96		
2012 Intake		24	96	
2013 Intake			24	96
2014 Intake				24
Total	80	288	400	552

- (1) There will be 10 percent of the April 30, 2011 provisional members ($1,900 \times 10\% = 190$) that will not complete under the old program and 80 percent of these (152) will become candidates under the new program. One third (50) will be under the PLAR route.
- (2) There will be 400 applicants in 2011 and each year thereafter. 280 of these will have a planning degree. Of these 20 percent will take the course in 2011, 20 percent in 2012, 40 percent in 2013, and 40 percent in 2014.
- (3) Each year 120 PLAR candidates will be approved. Twenty percent will complete the course in their first year with the balance in the second year.



Table 2 – Exam Writers

Exam Writers	2011	2012	2013	2014
Former Provisional - Planning Degree (1)	0	0	0	102
Former Provisional – Other degree (1)	0	0	0	50
Candidates– Planning Degree (2)				
2011 Intake	0	56	112	112
2012 Intake			56	112
2013 Intake				56
2014 Intake				
Candidates – PLAR (2)				
2011 Intake	0	24	96	
2012 Intake			24	96
2013 Intake				24
2014 Intake				
Total	0	80	288	552

- (1) There will be 10 percent of the April 30, 2011 provisional members ($1,900 \times 10\% = 190$) that will not complete under the old program and 80 percent of these (152) will become candidates under the new program. One third (50) will be under the PLAR route.
- (2) It is estimated that 20 percent of the candidates will meet the work experience requirement after the one year mentorship, completion of the course and write the exam. The balance of the PLAR candidates will take the exam in the second year. The balance of the Planning Degree candidates will meet the pre exam requirements as follows: year 2 – 20 percent; year 3- 40 percent; and year 4 – 40 percent.



Accreditation Assumptions

- The Accreditation Program Committee will meet at least once in 2011.
- The existing recognition of planning schools will continue during a transition period of no less than five years from the effective date of implementation to coincide with the schools' periodic intensive review.
- Three planning schools will receive an accreditation review in 2011 and approximately four or five each year thereafter.

Based on the preceding assumptions and assumptions around pricing and fees, the estimated governance and administrative support for certification and accreditation, could be determined for 2011 and the years beyond. No assumptions have been made regarding pricing and fees at this time. Some of the costs are for:

Volunteers/Experts

- Time and honorariums as required, to develop and test exams.
- Time to plan and conduct accreditation reviews and visits.
- Time and honorariums as required, to evaluate applicants.
- Time for board and committee meetings (PSB, Accreditation, Professional Education and Examination Committees, etc.).

Staffing

- Support for the board and committees.
- Processing of course enrollments.
- Processing of applicants for candidate status.
- Supporting accreditation reviews and visits.

Based on the assumptions and low volume in 2011 it is expected that the staffing support required will be less than the equivalent of one full time position.

The support required will be much higher in 2012 as exam activity will commence and course enrollments will increase.

Given the increased use of technology and consolidation of administrative processes it is expected that the costs (staff and volunteer time) for processing a candidate will be much lower than the current costs for a provisional member. While the economies of scale should produce some savings, most of the savings may be offset with governance costs for the PSB. It should be noted that the overall quality with certification and accreditation will be greatly enhanced.

All partners supporting PSB through the shared services agreement will be cognizant of costs and quality and therefore it is expected that every effort will be made to ensure there is a fair balance with cost and quality.

A detailed budget based on assumptions for volumes, estimated costs and fees will be developed if the concept is approved by Affiliates.



E. Recommendations

Based on a review of the policy changes in certification and accreditation and methods of delivery, the following recommendations have been developed.

Recommendation 1

Establish an independent Professional Standards Board (PSB) for the planning profession in Canada to administer national standards as assigned by the National Standards Committee and agreed to by Affiliates and CIP.

Recommendation 2

Approve the mandate, structure and operations arrangements for the proposed Professional Standards Board.

Recommendation 3

Affiliates and CIP establish appropriate agreements with PSB to cover services and financing arrangements in 2011.

Recommendation 4

Affiliates and CIP proceed to amend by-laws and policies to reflect the standard policies currently agreed to and the mandate and role of the proposed Professional Standards Board.

F. Conclusion and Summary

As stated at the outset, agreement with these recommendations will allow the planning profession to make important and necessary reputational, organizational, administrative and legislative advancements. Moving forward, it will be critical to ensure that all transitional issues are addressed and the PSB is adequately resourced at start up. Ultimately, the success of this endeavour will require the ongoing involvement of highly experienced and motivated people dedicated to advancing the core membership function of the planning profession.

Appendix A – Professional Education and Examination Committee

Governance Arrangements for the Professional Education and Examination Committee

PEEC Purpose & Mandate:

The purpose of the PEEC shall be to: develop, deliver, and maintain the Professional Examination and the Ethics & Professionalism Course under the auspices of the Professional Standards Board (PSB) in cooperation with Affiliates and CIP, as required.

The PEEC will, working with Affiliates and CIP, ensure the regular, consistent, and timely delivery and evaluation of offerings/sittings of the Professional Examination and the Ethics & Professionalism Course.

The PEEC will ensure the ongoing integrity, consistency, quality and relevancy of the Professional Examination and the Ethics & Professionalism Course.

The PEEC will, under the auspices of the PSB, ensure appropriate policies, procedures, guidelines, resources, and other materials are in place and/or available as required for the effective and successful delivery of the Professional Examination and the Ethics & Professionalism Course.

The PEEC will recruit, identify, designate and maintain a “pool” of volunteer Designated Examiners, and oversee and manage their activities as required.

The PEEC will develop and maintain a Professional Examination “Exam Bank” of potential questions and/or exercises and related answers/solutions & evaluation guidelines for the Professional Examination and the Ethics & Professionalism Course.

The PEEC will advise the PSB on matters of administrative and other policies with respect to the Professional Exam and the Ethics & Professionalism Course, as may be required from time to time.

PEEC Structure & Composition:

The PEEC would be a standing subcommittee of the Planning Standards Board (PSB). The PEEC would be comprised of six members – appointed by the PSB – from amongst suitable, qualified Members in good standing of the Institute.

The membership of the PEEC shall include one current member of the PSB, appointed by the PSB, who shall act as a liaison between the PEEC and PSB.

The PEEC shall select and appoint from among its members a Chair and a Deputy Chair, who shall serve in such roles for a period of one year (with the possibility of reappointment at the discretion of the PEEC).

Criteria to consider with respect to the suitability & qualification of potential appointment of members to the PEEC would include:

- A minimum of at least 7 to 10 years of Full Membership in the Institute
- Previous involvement in membership certification activities at a national or affiliate level (i.e. examination, membership committee, etc.)



- Issues of balance with respect to: gender, regional representation, & the inclusion of professional academic planners/members

The term of appointment for members of the PEEC will be three years, with the opportunity for reappointment at the discretion of the PSB. All appointments will be limited to two a maximum of two consecutive three-year terms, with the possibility of reappointment at the discretion of the PSB after at least one term of absence.

In order to ensure continuity and stability, the term of office for PEEC members will be staggered to ensure regular, limited rotation of members (i.e. one-third of the positions expire/appointed each year).

Outgoing or experienced PEEC members may be appointed to other subcommittees of the PSB, and may be seen as possible future nominees to the PSB itself.

The PSB will provide a minimum level of training, as well as provide appropriate resource materials and information to newly appointed members of the PEEC to ensure such members are able to fulfill their responsibilities effectively.

Members of the PEEC may receive a honourarium from the PSB, at the discretion of the PSB.

Designated Examiners:

Designated Examiners will be responsible for assisting the PEEC with the ongoing marking and evaluation of Candidate's submissions for the Professional Exam and the Ethics & Professionalism Course, as well as serving as facilitators/instructors for the Ethics & Professionalism Course.

Designated Examiners will be responsible for assisting the PEEC with the ongoing development and maintenance of the "Exam Bank" as may be required from time to time.

Designated Examiners will be recruited and designated by the PEEC from amongst suitable, qualified Members in good standing of the Institute. Criteria to consider with respect to the suitability and qualification of potential appointment of Designated Examiners would include:

- A minimum of at least 7 to 10 years of Full Membership in the Institute
- Previous involvement in membership certification activities at a national or affiliate level (i.e. examination, membership committee, etc.)
- Issues of balance with respect to: gender, regional representation, and the inclusion of professional academic planners/members

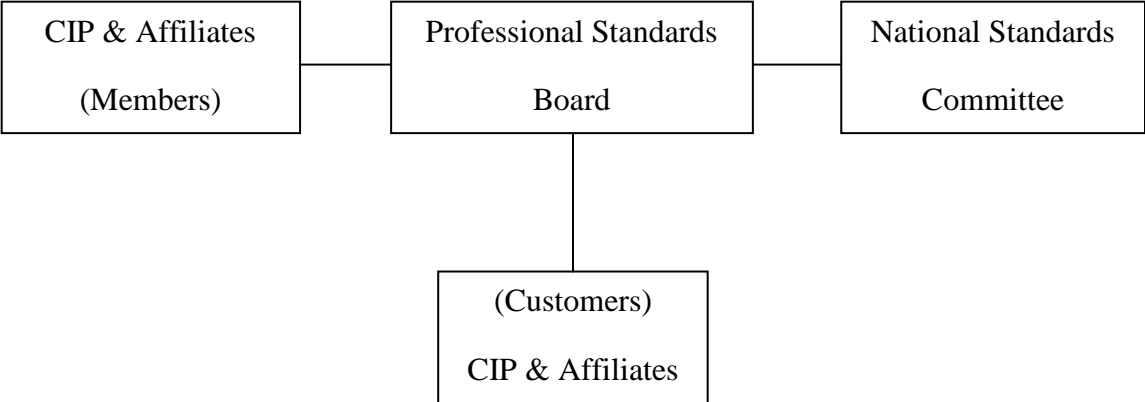
The term of service for Designated Examiners will be at the discretion of the PEEC. The number of Designated Examiners at any given time shall be at the discretion of the PEEC, as may be required and determined from time to time. *(Likely at least 10 – 20 across the country)*

The PEEC will provide a minimum level of training, as well as provide appropriate resource materials and information to Designated Examiners to ensure such members are able to fulfill their responsibilities effectively.

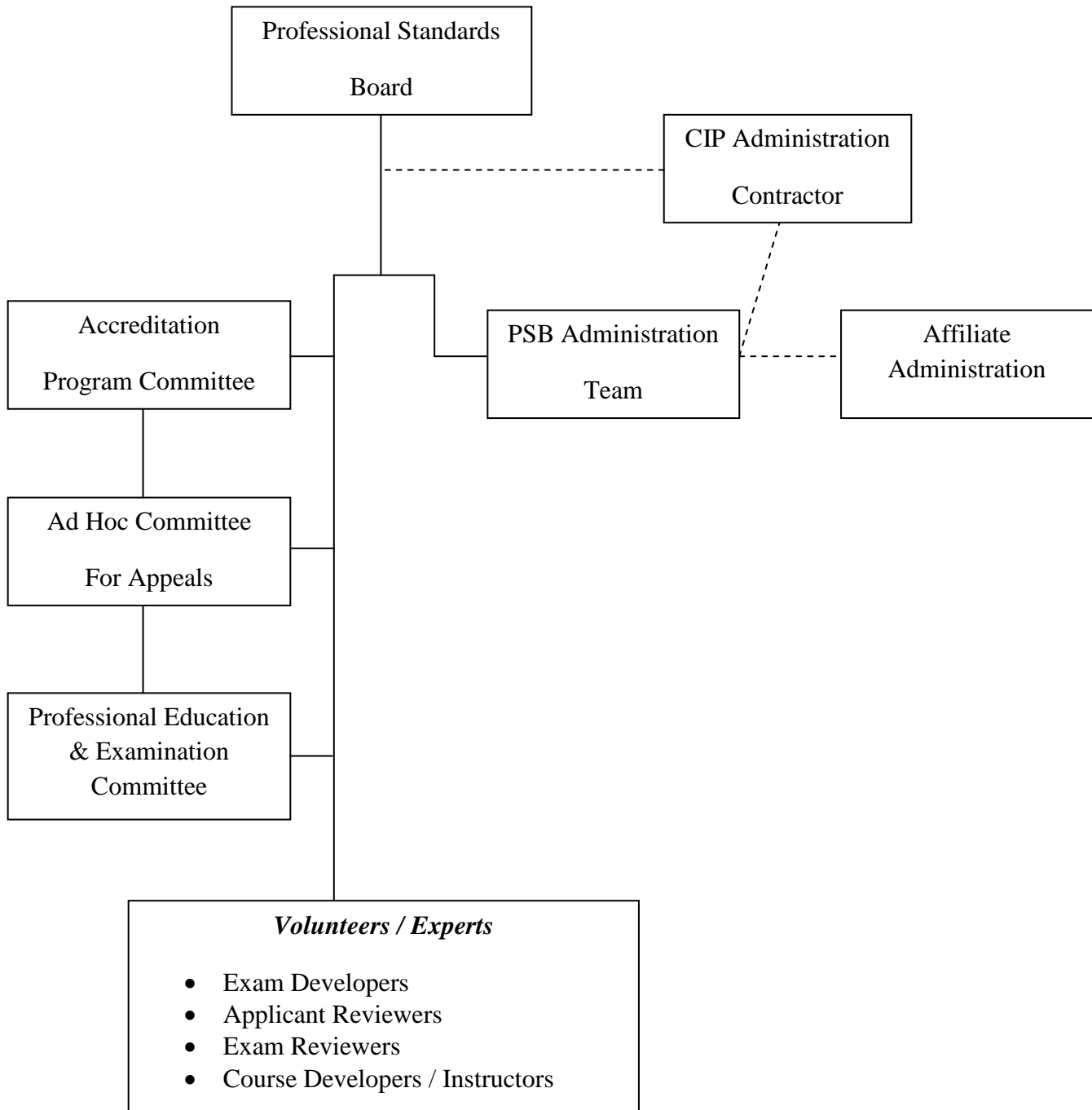
Designated Examiners may receive an honorarium from the PSB, at the discretion of the PSB.

Appendix B - Organizational Charts

External Chart



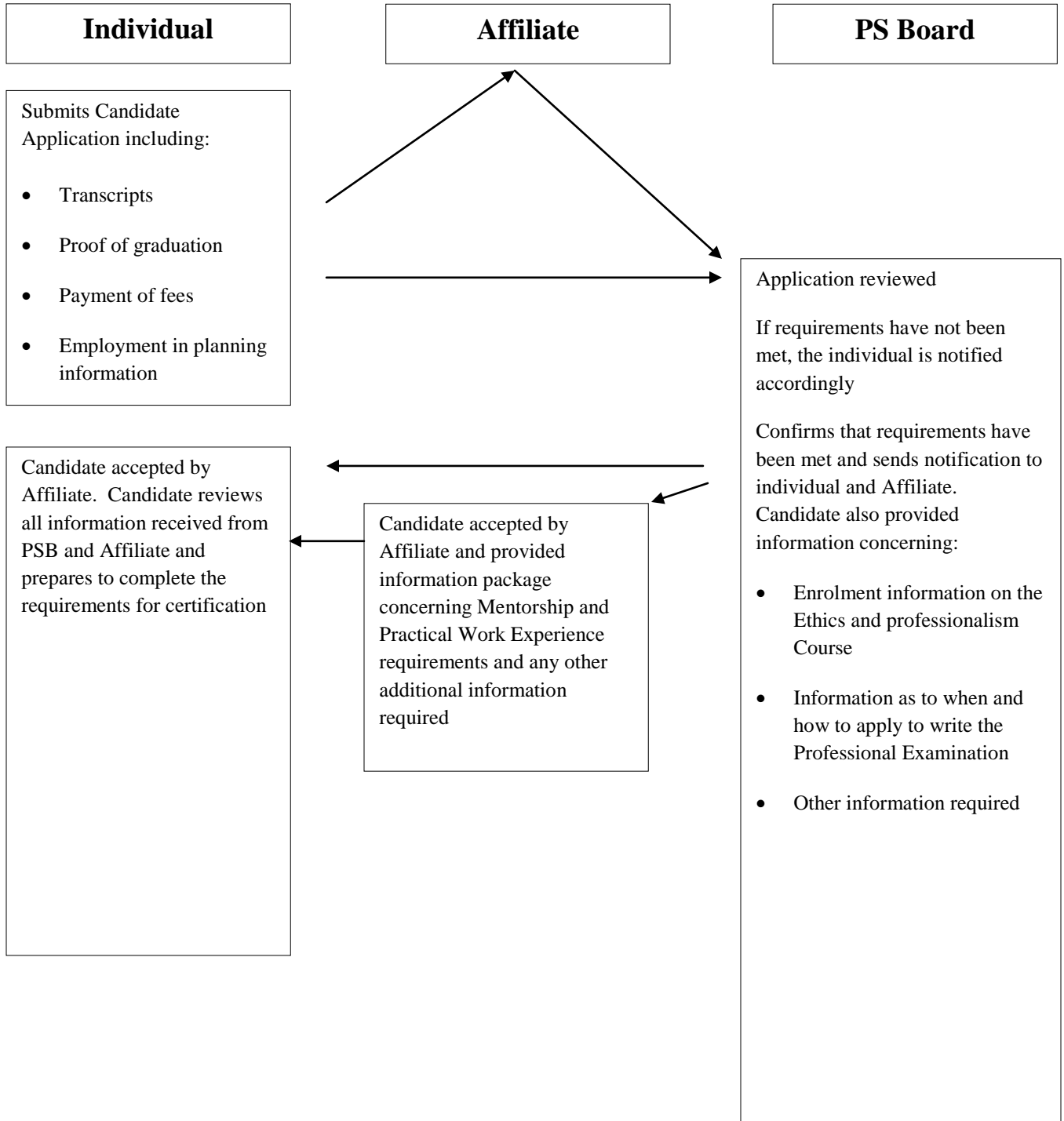
Internal Chart



Appendix C - Operational Workflow and Routes to Certification

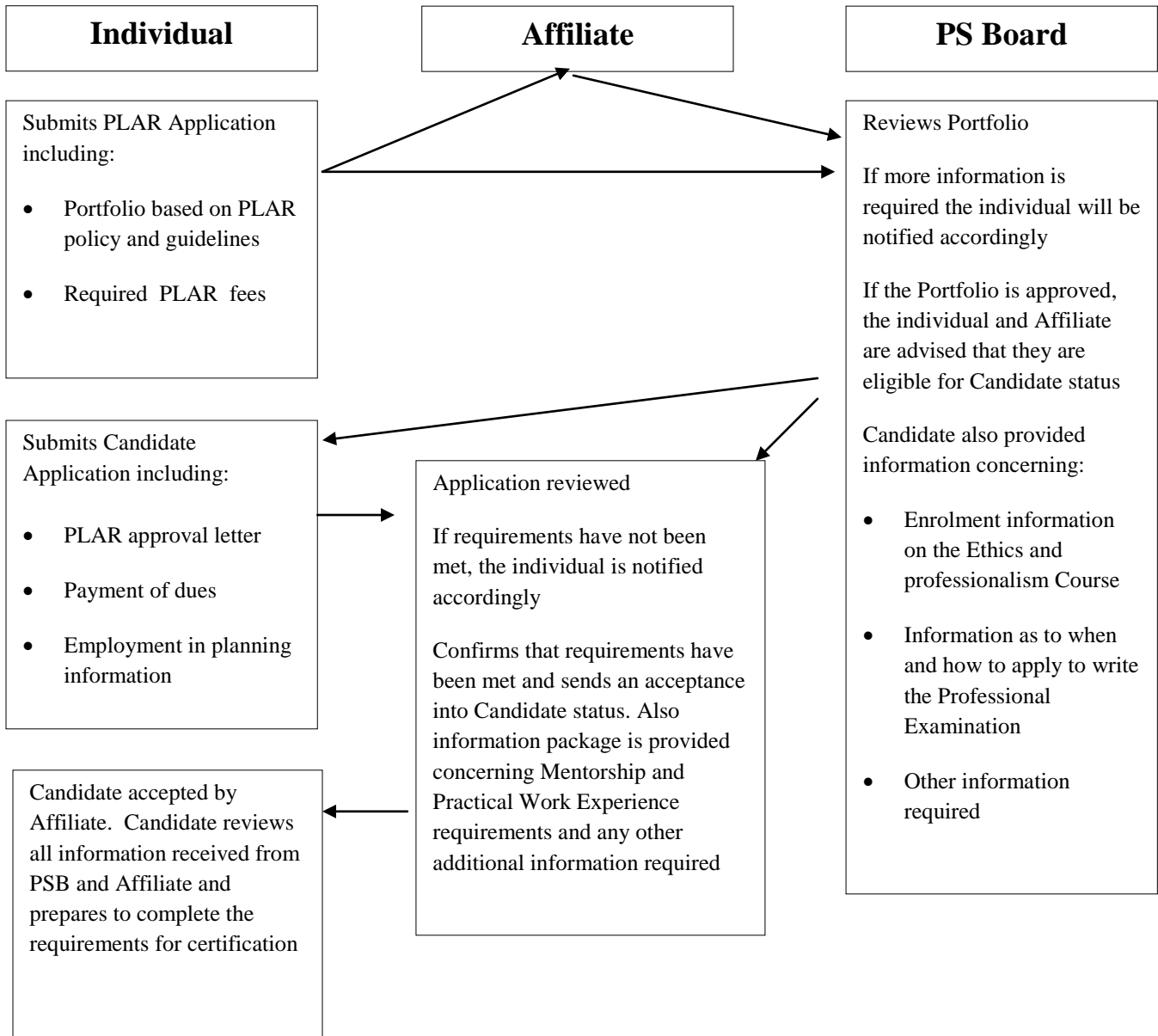
Application for Candidate Status

Planning Degree Route “A”



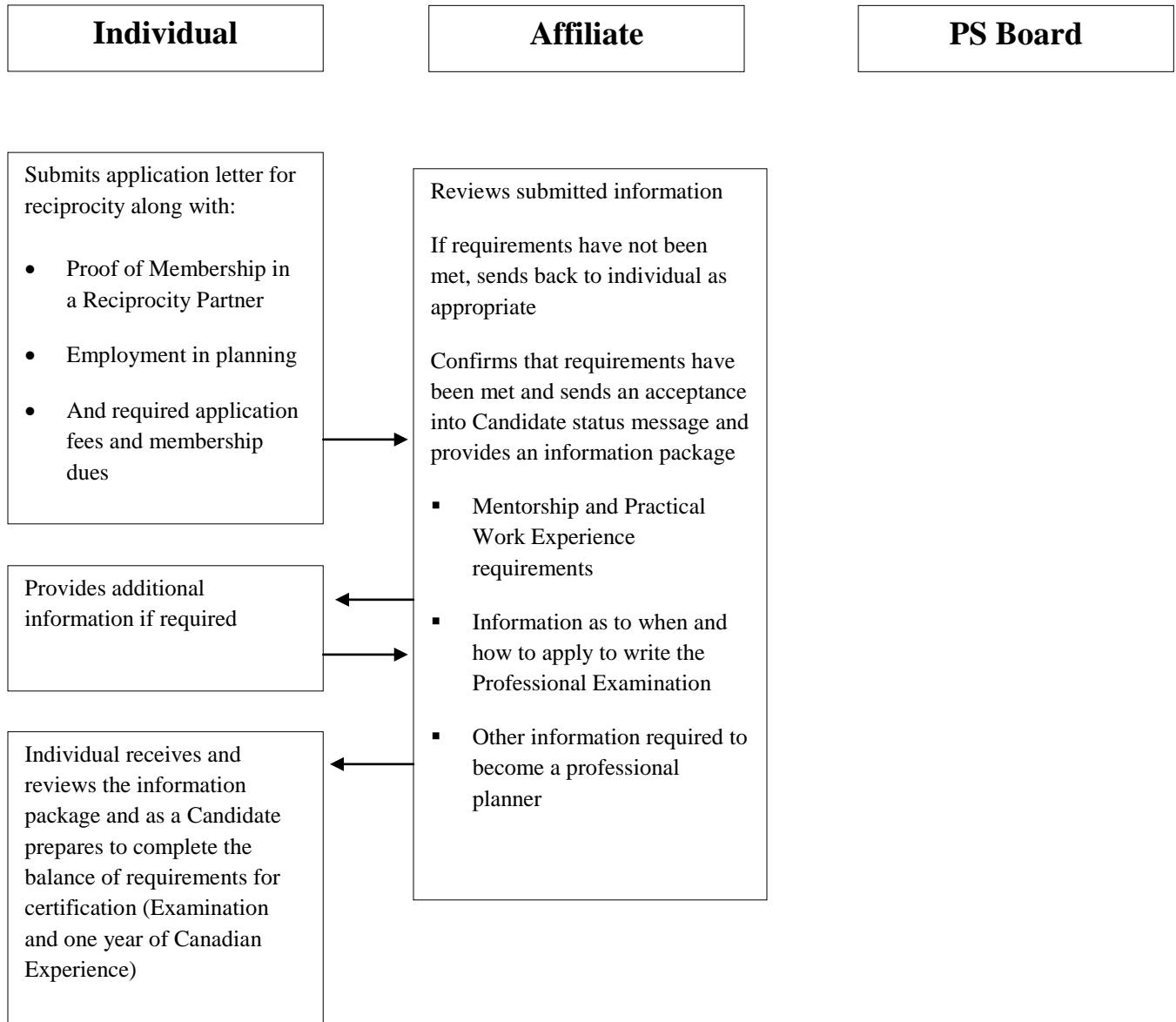
Application for Candidate Status

PLAR Route “B”

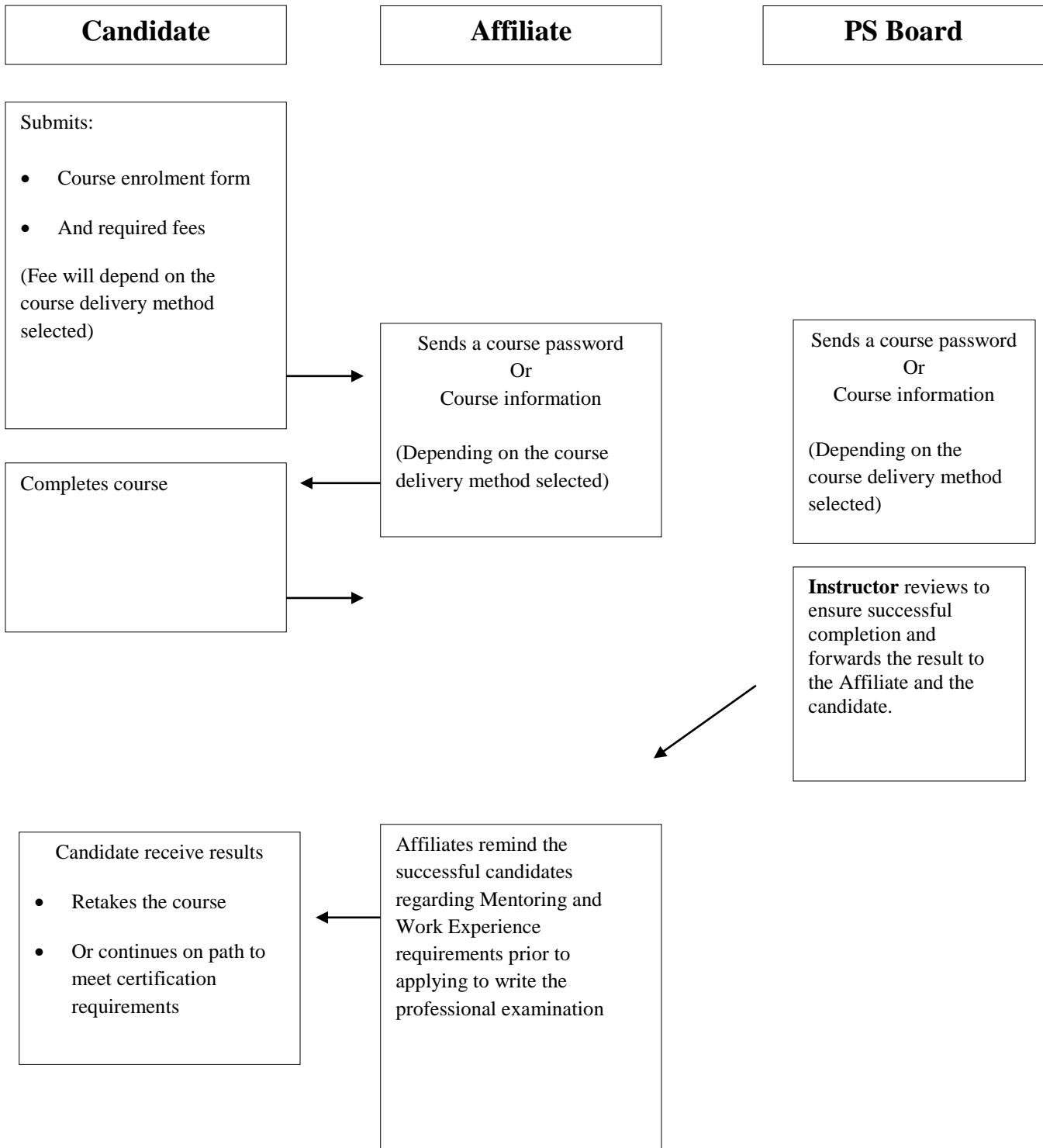


Application for Candidate Status

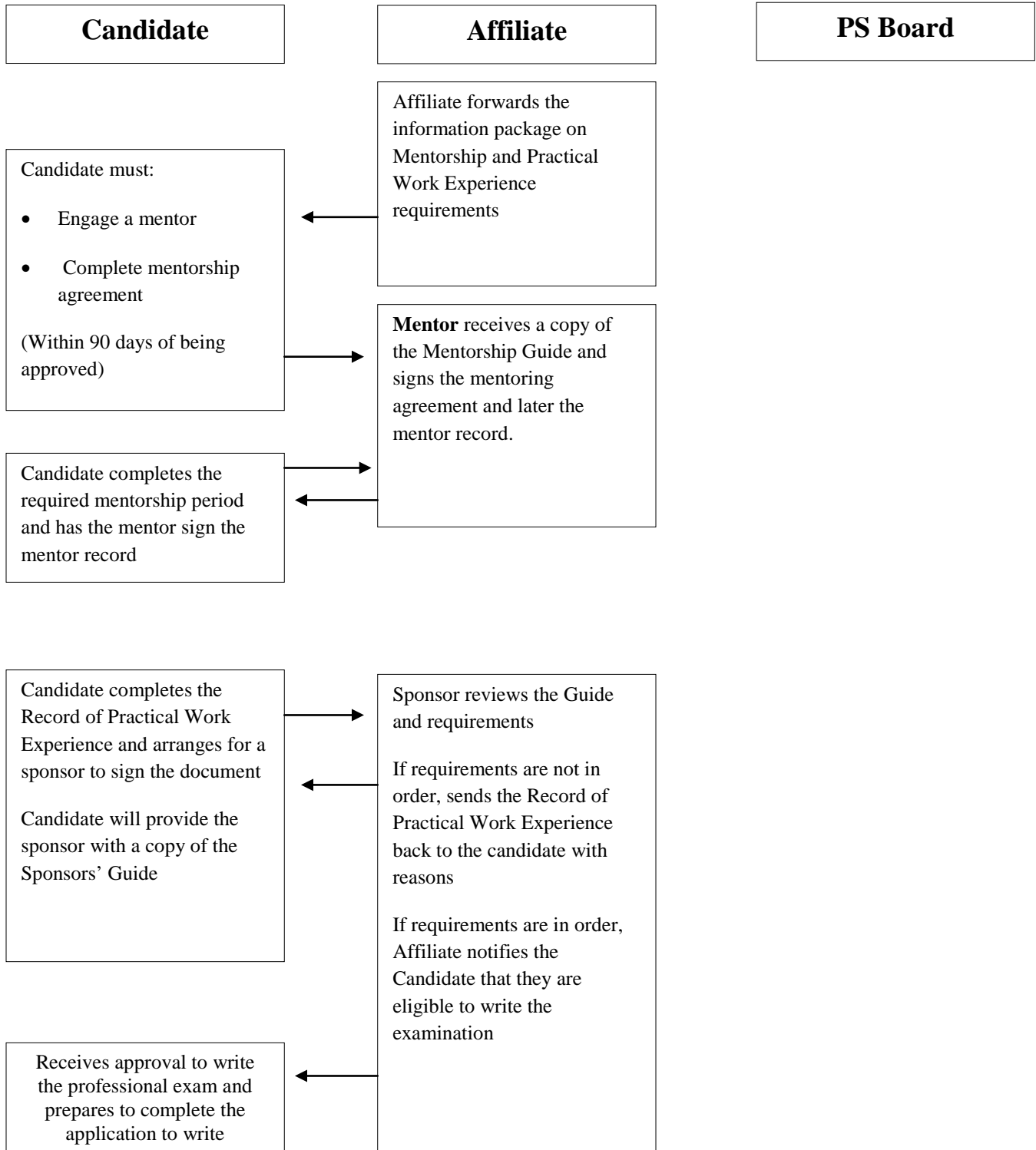
Reciprocity Route “C”



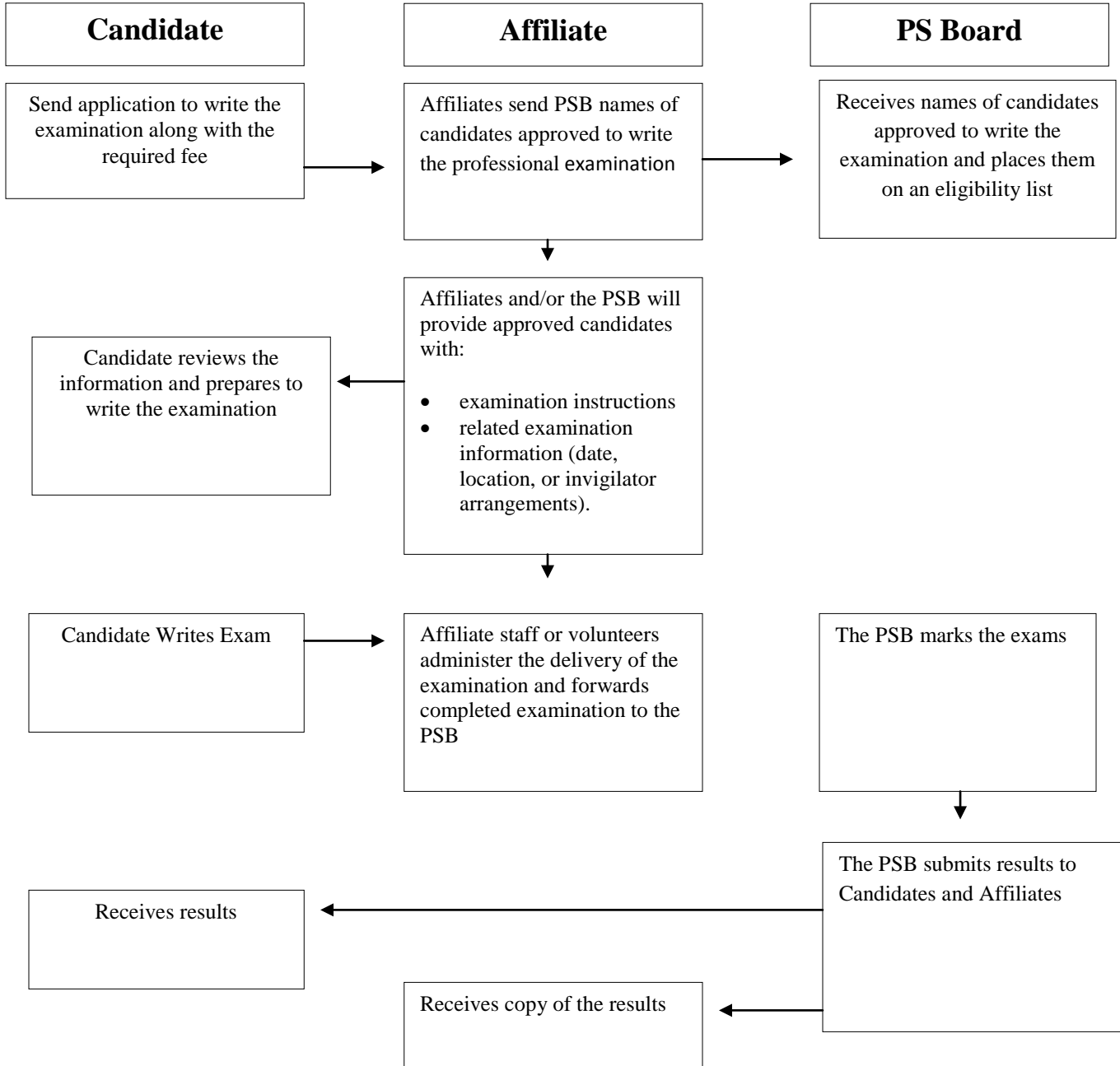
Professional Education Program for Candidates



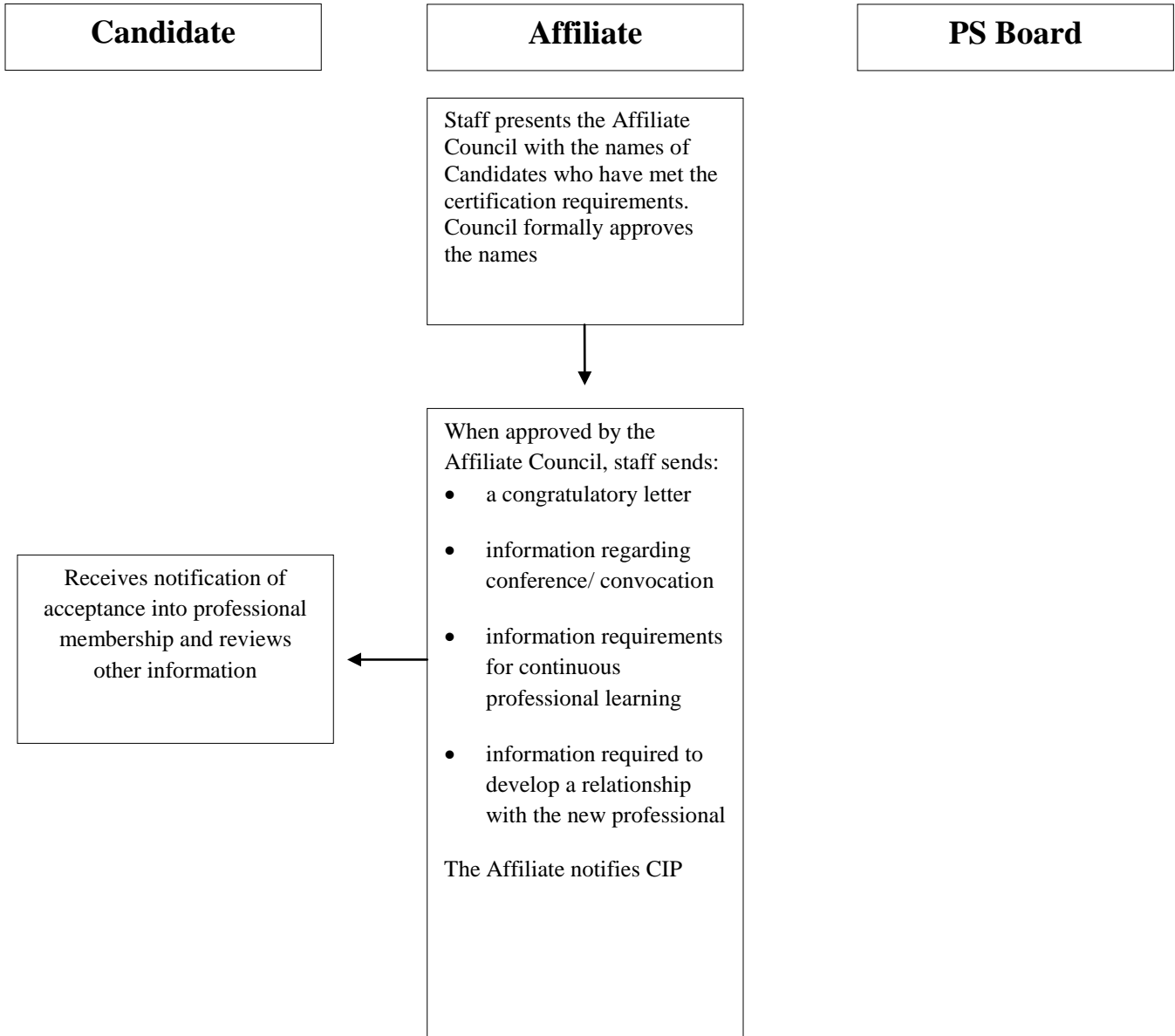
Mentoring and Practical Work Experience



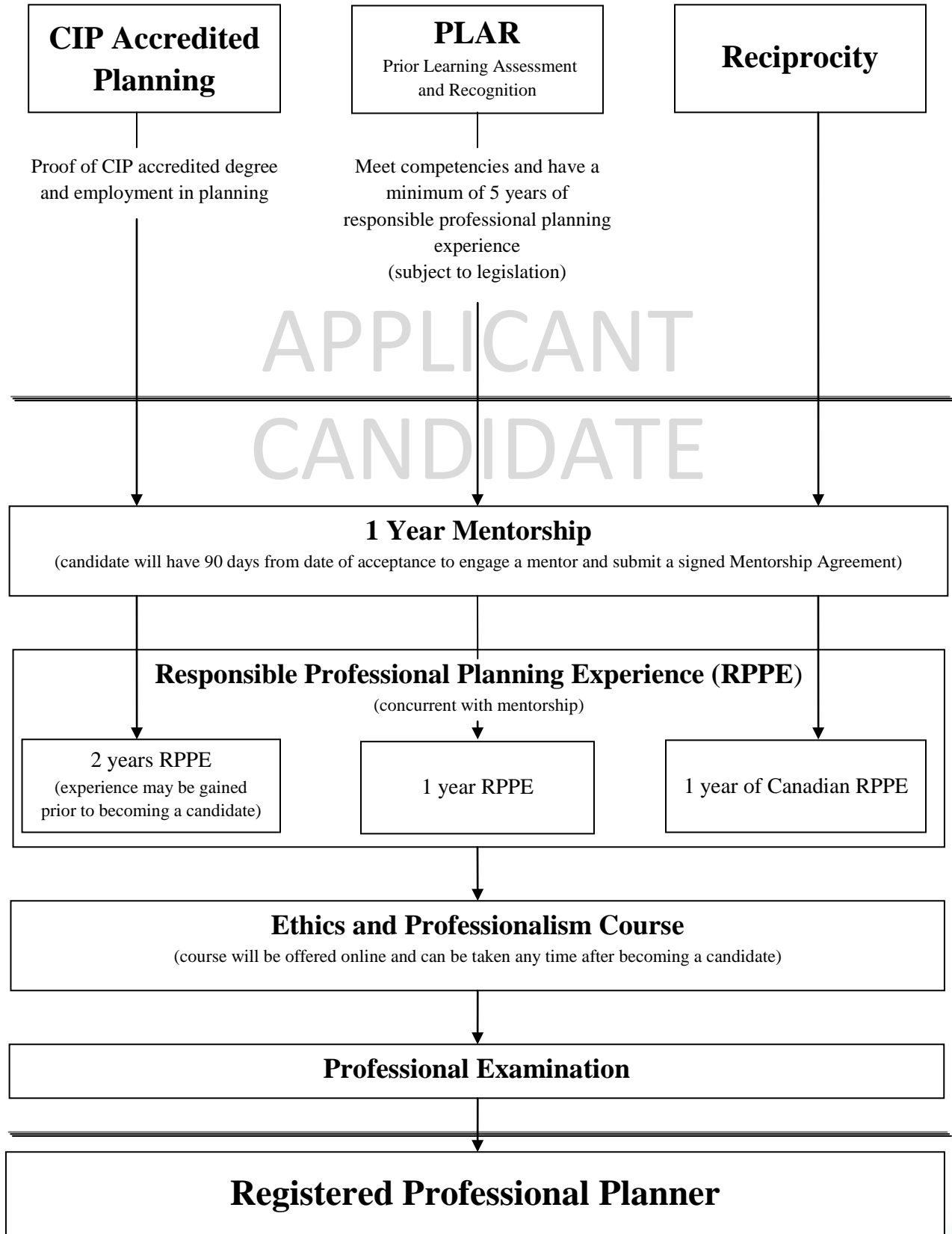
Professional Examination



Acceptance into Professional Membership




Routes to Certification



Appendix D – Steps and Paths to Certification

Steps to Certification as a Professional Planner

						
Apply for Candidate Status	Candidate Status Awarded	Meet Mentorship Requirements	Satisfactory Complete Ethics and Professionalism Course	Meet Practical Work Experience and Sponsorship Requirements	Pass Professional Examination	Professional Status Granted by Council

Activity in the steps will vary slightly depending on the pathway to certification. The details for the CIP Accredited Planning Degree path 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.
- 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. Satisfactory Complete Ethics and Professionalism Course

- The candidates can enrol in this course any time after being accepted as a candidate. Candidates unable to pass 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 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.



Applicants with a Non-CIP Accredited Planning Degree (PLAR) - Steps to Certification

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.
- 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. Satisfactory Complete Ethics and Professionalism Course

- The candidate can enrol in this course any time after being accepted as a candidate. Candidates unable to pass 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.

