

Membership Continuous Improvement Project
New Horizons for the Profession



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Canadian Institute of Planners

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1. Introduction and Background

The Canadian Institute of Planners (CIP) is a not-for-profit collaborative national federation that advances professional planning excellence through the delivery of membership and public services in Canada and abroad. CIP has been dedicated to the advancement of responsible planning throughout Canada since 1919. As a professional institute and certification body it has a mandate from its 6,800 plus members to:

- champion and lead progress and change in planning practice;
- act as the authoritative voice and the primary information and knowledge sharing network for planners;
- address issues of importance to the planning profession and/or the public interest;
- institute national standards for training, certification and best practices achieved through continued professional development of its membership; and
- deliver relevant and contemporary benefits and services to its members.

The collaborative national federation comprises seven affiliates that play a key role in developing and administering national standards. To comply with its members' mandate, the Institute and its Affiliates want to ensure that standards are rigorous, consistent, and fairly applied. Portability of membership must be maintained across the country. It is also critical to develop future strategy and engage in improvements so the Institute has the capacity to manage change both within and outside the profession.

The Institute's membership process and standards have not been reviewed since the mid-1980s. However, the planning profession has continued to evolve and gain in prominence. There have also been changes in the external environment that impact the ways in which the profession deals with issues and the competencies that will be required of a professional planner.

Determining competencies and keeping them relevant as the profession moves forward will be an important and challenging task. Some would say that this is the most important mandate for the profession in the near term.

For some leaders in the profession, their greatest contribution to the profession will be to create the conditions for the future to unfold and to help develop credentialing standards that will serve the profession and its future members.

International and inter-provincial agreements are placing an increased emphasis on removing barriers to labour mobility. In 1994, for example, the First Ministers of Canada reached an Agreement on Internal Trade. This agreement seeks to address obstacles to the free movement of persons, goods, services and investments within Canada. It calls for equal treatment of all Canadians, and for removal of inter-provincial barriers to trade and movement. One of the specific sectors it identifies for reducing trade barriers is labour mobility, which is defined as the freedom of workers to practice their occupations wherever opportunities exist.

CIP has worked hard over the years to ensure that its members are able to practice their professions anywhere in Canada and, more recently, has secured reciprocity agreements with planning institutes in other countries to facilitate international mobility for its members.

Given external changes, the desire to enhance standards, and address internal issues, a decision was made to undertake a membership continuous improvement project. This project is a comprehensive review of membership issues, including a complete and thorough assessment of membership processes and standards at both the National and Affiliate levels.

The review included a scan of other professional associations to seek out better practices in issues such as: codes of practice; liability coverage; continuous professional learning; self governing mechanisms, including disciplinary procedures; and licensing. The review investigated equitable, clear, consistent, and transparent access to the profession, domestically and abroad. The objective--identify ways and means of addressing external and internal challenges, identify and recommend improvements, and develop new policy and processes to allow CIP to continue to meet the expectations of its constituents and its mandate now and into the future.

Some of the primary areas of interest addressed are:

- Provincial regulatory influences on membership criteria
- Consistency between CIP and membership requirements
- Integration of Bylaw provisions, CIP Bylaw Schedule A, on National Membership Criteria and the Membership Manual
- Criteria for degree recognition
- Consistency with the Agreement on Internal Trade and portability of membership
- Procedures for foreign applicants
- Role of the CIP National Discipline Committee
- Appropriateness and timeliness of processes
- Improvements to standards and processes based on better practices

Examining these and other related issues will lead to improvements that will enhance professionalism and strengthen the Institute's and Affiliates' abilities to develop and implement standards which are rigorous, consistent and fairly applied, and that membership policy and processes are transparent, timely, uniform, efficient and effective. The expectation is that these improvements will not only position the profession to meet today's needs, but build a stronger sense of professional community by raising the bar and position the organization to meet and exceed the needs for the future. To support the membership continuous improvement project an external consultant was engaged.

The Consultant

The intent of the Membership Continuous Improvement Project (MCIP) was to have a qualified consultant conduct an arms length and independent review of our membership standards and processes.

Jim Pealow, Managing Partner of Association Management Consulting & Evaluation Services (AMCES), was the project manager. Jim drew on his experience serving as chief volunteer for six professional organizations, working as CEO for leading associations, consulting with over ninety associations on over 120 projects, writing not-for-profit publications/articles, and information gathered from teaching association management courses to over 1,000 students.

The Method

Improving membership standards and practices has an impact on key Institute and Affiliate stakeholders and, as a result, the approach is to involve Institute and Affiliate decision makers at different stages of the processes. Some of the internal activities used to gather input on potential initiatives or recommendations have included:

- Preliminary consultation with senior staff and the National Membership Committee;
- Discussions with a supportive task group;
- Review of CIP by-laws, minutes, plans, policies, manuals, procedures, programs and services, reports, and other relevant material;
- Review of the Institute and Affiliate websites;
- Review of membership policy and processes activity at the Institute and Affiliate levels;
- Discussions with the National Membership Committee;
- Discussions with Registrars and Institute and Affiliate staff;
- Discussions with the Institute Council;
- Discussions with Affiliate Presidents; and
- Discussions with selected Committee Chairs.

All individuals and groups were most cooperative. They raised important questions and provided valuable feedback.

In addition to the above, information on the latest trends and practices information was gathered through literature reviews, web searches and benchmarking surveys for the selected topic areas.

Recommendations

This report first provides a review of the current situation and then identifies a preferred future or a new horizon, and is supported with recommendations to close the gap between the current situation and the new horizon. Recommendations then follow with information on supportive activities, internal linkages, timelines and performance indicators.

Recommendations included in this report represent Jim Pealow's considered opinion as to the direction CIP should consider taking to maximize its effectiveness as an organization in meeting members' needs, dealing with the issues identified, and achieving its mission and growing the profession. Decisions made to enhance performance and improve activities for the profession are the responsibility of the CIP and Affiliates' leadership.

Based on the mandate and issues to be addressed for the Membership Continuous Improvement Project, the following key membership standards for a professional association are examined:

- National Standards
- Competency
- Certification
- Ethical
- Accreditation
- Reciprocity and Non-Residents
- Legislation
- Membership

For each of these areas questions were asked to determine the current organizational arrangements, variances from standards, current legislation, other issues of concern, and what potential improvements could be made.

National and Affiliate leaders have a high level of interest in enhancing the profession, becoming “state of the art” and resolving concerns identified in the current situation. Based on discussions with groups and individuals, and reviewing internal and external materials, recommendations have been developed for key activities to “raise the bar” for the profession and create new horizons. These recommendations provide opportunities for improvement and new horizons for the profession’s leadership to aspire to.

2. National Standards

2.1 RECOMMENDATIONS

- 1. Update and put in place Affiliate Agreements that contain relevant provisions that support clarity on roles and responsibilities and general arrangements between the Institute and Affiliates.*
- 2. Develop and put in place a Mutual Recognition Agreement as per the requirements of Chapter Seven of the Agreement on Internal Trade.*

2.2 CURRENT SITUATION

The Institute and Affiliates have developed national standards for membership. Information on the standards is contained in a membership manual which is the responsibility of the joint National/Affiliate Membership Committee and available for Affiliate Membership Committees. The type of information contained in the manual follows:

Volume 1 - Introduction

Introduction

- Local variations
- Legislation

Updating the Manual

Definitions

Appeals

Membership Committee Terms of Reference

Volume 2 – Applications for Membership

Classes of Membership

Affiliate

National Membership Committee

Foreign Degrees

Responsible Professional Planning Experience

Examiners

Written Examination

Guidelines for the Portfolio

Oral Examination

Applications for Membership

Administrative Process or Admitting Members to CIP

General Policies and Minimum Requirements

Time Limits

Fees

Leave of Absence

Transfer of Membership

Applications from Non-residents

Public Associates

Honorary Members

Fellows

Appendix - Canadian Institute of Planners - Examination for Membership

Appendix - Oral Examination Guidelines (To be provided to Candidate)

Appendix - Oral Examination Questions

Appendix - Application for Membership (Non-resident)

Appendix - Logbook

Appendix - List of Recognized Equivalent Professions

Appendix - Special Examination for Candidates without Canadian Experience

Volume 3 Recognition of University Degrees

General

Procedures

Program Content Requirements –Minimum Standards Guidelines

Guide for Site Visit Committee

Application Fee

Appendix - Recognized Planning Programs

Appendix – Application for Recognition of University Degrees

In most cases, content from the manual appears exactly the same in Affiliate information. There are some minor differences and suggestions for improvement. The differences are mainly tied to application of the standards. Issues and concerns around provincial regulation and the impact on national standards were raised and will be covered in other sections. It was suggested on a number of occasions that orientation and training sessions would improve understanding and administration of standards.

A professional association's activities must be considered seamless by members and those served by members. Any variances may suggest the profession is in the early stages of development and standards are not consistent, and this may give rise to some uncertainty. In turn, the image of the profession may be perceived differently.

There appears to be a strong commitment among those consulted to having national standards for the profession.

2.3 NEW HORIZON

The Affiliates and the Institute support uniformity and consistency in the development and application of national standards. The National/Affiliate Membership Committee plays a key role in working with the Institute, Affiliates and members in developing and maintaining relevant national standards. An affiliation agreement between the Institute and Affiliates provides for the terms of reference for the National/Affiliate Membership Committee. National standards to support the professional designation and labour mobility are referenced in the affiliation agreements. A Mutual Recognition Agreement amongst Affiliates is in place to support labour mobility in accordance with Chapter Seven of the Agreement on Internal Trade.

The profession requires that agreements, policies and processes to develop and implement standards which are rigorous, consistent and fairly applied, and that membership policy and processes are transparent, timely, uniform, efficient and effective.

2.4 IMPLEMENTATION

Activities

- The Institute reviews sample affiliation agreements, determine required provisions, considers approved recommendations from this report and develops a draft affiliation agreement.
- The draft agreement is shared with Affiliates for review and input.
- Based on findings from the review, the agreement is revised and considered for signing by the parties.
- The Institute develops a draft Mutual Recognition Agreement for Affiliates and coordinates the input and revisions leading to approval by the Affiliates.

Internal Linkages

- Standing Committees should be asked to review the proposed agreements based on their terms of reference and provide input as applicable.

Timelines

- Signing of both agreements prior to December 31, 2006

Resources

- Volunteer review time
- Staff coordination
- Final legal review

Performance Indicators

- Signed Affiliation Agreements
- Signed Mutual Recognition Agreement

3. Competency

3.1 RECOMMENDATION

- 1. Establish National Competency Standards to support certification (professional program courses, prior learning assessment recognition and advanced standing, work experience criteria, continuous professional learning development, examination development, reciprocity arrangements) and accreditation standards.*

3.2 CURRENT SITUATION

The Institute has identified minimum knowledge and skill components areas that are used to recognize degree programs. These components influence curriculum for degree programs and have not been updated in the last ten years. The current knowledge and skill components include:

- Structure and Function of Human Settlements
- History and Principles of Community Planning Processes and Practices
- Legislative, Legal, Political and Administrative Aspects of Planning and Policy Implementation
- Methods of Policy Implementation and Planning
- Environmental and Ecological Aspects of Planning
- Problem Identification, Research Skills, and Data Gathering
- Analytical Skills
- Written, Oral and Graphic Communication Skills
- Collaborative Problem Solving Skills
- Synthesis and Application of Knowledge to Practice
- Ethics

There is no evidence that demonstrates the above is linked to work experience, examination or continuous professional learning experience.

Professional associations have developed National Competency Standards or have converted their professional Body of Knowledge to a broader competency based method. The development and maintenance of the standards allows the profession to explore members', employers' and customer requirements for knowledge, skills and attitude for professionals practicing in the planning profession. Having these standards will strengthen the link between learning and practice and provide greater clarity for the profession.

The existing documentation will serve as resource material for the development of National Competency Standards.

3.3 NEW HORIZON

National Competency Standards are in place and updated every three years. These standards are used to provide direction in terms of measuring practical experience, professional examination development, and pre- and post-professional learning requirements. The National Competency Standards are used to identify courses eligible for advanced standing in the Professional Education Program and are linked to Continuous Professional Learning (CPL).

3.4 IMPLEMENTATION

Activities

- The National/Affiliate Membership Committee establishes a Competencies Task Force with a mandate to develop draft National Competency Standards for the Profession.
- The Task Force made up of individuals with broad practical experience and experience in development of competencies and curriculum will obtain input from employers/clients of professional planners.
- Findings of the Task Force, through the National/Affiliate Membership Committee will be provided to the Institute and Affiliates for comment prior to final consideration by the CIP Board.

Internal Linkages

- The Task Force will work with the Certification Task Force and other groups as linkages are required.

Timelines

- The work of the Task Force will result in National Competency Standards which will be used to support certification and other related areas. This content will need to be completed prior to development of many of the certification activities. (By March 2007)

Resources

- Volunteer review and revision time
- Staff coordination
- Travel expense for the Task Force
- Member and employer/client survey

Performance Indicators

- Third party (employer/client) input on competency standards
- National Competency Standards
- Professional Program linked to competency standards
- Accreditation Program linked to competency standards
- CPL linked to competency standards
- Policy to support ongoing competency updating

4. Certification

4.1 RECOMMENDATIONS

- 1. Establish the following Certification Standards for the profession in Canada.*

The requirements for granting of the Registered Professional Planner designation are:

- (A) University degree and completion of the Professional Education Program requirements or equivalent Prior Learning Assessment Recognition (PLAR) approved portfolio.*
- (B) Minimum of three years full time Practical Work Experience gained in a planning environment and verified by three RPP sponsors.*
- (C) Successful completion of the National Professional Exam.*
- (D) Signed agreement to abide by the Standards of Ethical Conduct.*
- (E) Signed agreement to comply with the Continuous Professional Learning criteria as prescribed by Affiliates of CIP.*
- (F) Approval of the Provincial/Territorial Affiliate Council.*

The requirements to retain the Registered Professional Planner (RPP) designation are:

- (A) Be a member in good standing with the Canadian Institute of Planners and a Provincial/Territorial Affiliate.*
- (B) Be in compliance with the Continuous Professional Learning Criteria as prescribed by Affiliates of CIP.*

- 2. Develop a Professional Education Program linked to the National Competency Standards that grants advanced standing for those with recognized planning and planning related degrees. Include in the Professional Education Program a mandatory course or courses to add value by integration of various course competencies, address ethical issues and practices and other professional issues, and current and future practice developments.*
- 3. Revise the minimum Practical Work Experience Criteria to three years and provide a requirement that experience obtained must be progressive and reflect the National Competency Standards. The onus to demonstrate experience is placed on the candidate with sponsors verifying compliance.*
- 4. Establish National Professional Examination Criteria which requires all candidates for the RPP professional designation to successfully complete the written National Professional Examination. The current Oral Examination will be dropped and evaluation components shifted to Sponsors, the National Professional Examination and the Practical Work Experience Criteria.*

5. *Establish a National Board of Examiners to set the examinations, develop related exam policy and processes, and apply a team approach to examination marking using trained volunteers. Provide the exam at least twice a year in all locations and on the same date to maintain security.*
6. *Build on the existing Guidelines for Portfolio, develop a Prior Learning Assessment Recognition (PLAR) Policy based on the National Competency Standards for candidates with a minimum of seven years of responsible planning experience. Identify other PLAR advanced standing criteria necessary for those not progressing through the regular route to the RPP professional designation.*
7. *The new Certification Standards take effect on September 1, 2008.*

4.2 CURRENT SITUATION

A university degree, practical work experience, and an examination or portfolio is required as a minimum standard for admission to professional membership.

The current regular process for admitting members or certification as a MCIP is to have a Provisional Member complete an application form and submit the required fee. The application form is to include a signed validation as to completion of necessary experience and education and successful completion of the Written Examination and the Oral Examination, as applicable.

Individuals with a recognized degree in planning from a Canadian university require two years of responsible professional planning experience. Four years experience is required if the university degree is from a field related to planning. Six years experience is required if the university degree is from a field not related to planning. A special written examination on the Canadian planning system must be completed if the candidate has less than two years responsible professional planning experience in Canada,

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.

Required experience must be in at least two types of planning work with at least six months being spent in one of these two activities. Experience is tracked by scale, process and subject matter.

A log book is provided to provisional members so they can record their responsible planning experience based on the definition of planning. The log book is considered the property of the Institute, is subject to audit, and is provided with detailed instructions. Affiliates are responsible for reviewing and approving log books.

If the candidate does not hold a recognized degree in planning, a Written Examination or a review of a Portfolio of work is required. Some Affiliates provide a Membership or Executive Practitioners Course to prepare individuals to write the Written Examination. The Written Examination is available to Provisional Members who have logged at least 50 percent of their minimum logging requirement.

An Oral Examination is to be completed by all candidates for membership in CIP. The CIP Membership Manual provides policies and administrative process for examinations.

If provisional members do not hold a recognized degree in planning, but have a substantial amount of professional experience in planning they can prepare a Portfolio for review. If the Portfolio is approved by the Affiliate, and upon successful completion of the Oral Examination they can qualify for MCIP membership. The CIP Membership Manual provides policies and administrative process for the Portfolio route to the MCIP designation.

The application and related information is reviewed by the Affiliate Membership Committee. Upon determining that all criteria have been met, the application is then forwarded to the Affiliate Council for information approval. Slight differences in process may occur for those eligible to take the portfolio route.

Policy and administrative process for admitting members to CIP have been established. One of the requirements for the provisional membership application is to have the Affiliate Membership Committee verify the applicant's academic training and that if the applicant has no recognized planning degree, he or she is engaged in a job in the planning field. The Affiliate Membership Committee shall meet the candidate to clarify the process, establish collegial contacts, and discuss the meaning of professionalism.

The current policies and processes that support the MCIP certification process could be improved. The current process requires a lot of support from volunteers. In many cases, volunteers are tasked to assist with written or oral exams or review log books and they have received no related training. As the process is mainly volunteer dependent with most of the Affiliates it can sometimes take extended periods of time to make a decision.

Each Affiliate handles a very small number of Portfolio applications on an annual basis and in some cases there is uncertainty how to deal fairly with these. There are a good number of Provisional Members that are pushing the established time limit for applying for full membership. Some are exceeding the limit and this raises questions about application of the current requirements and their practicality. Perceptions exist that many individuals are in no hurry to obtain the designation, or they are having problems meeting the responsible planning experience requirement.

The exam process is not considered rigorous when compared to processes used by other professional groups. Exams are not perceived as difficult as the questions are known in advance. Exams are not revised on a regular basis to reflect changes in the environment and the application of different competencies. In some affiliates, only a limited number of individuals are required to challenge the exam. In the case of the Oral Exam, some think it is not an exam but an interview with potential sponsors.

The use of a central coordinated exam group is considered the norm with professional groups. Often a National Exam Board is assigned the responsibility by affiliates for developing quality exams and the marking process.

Depending on the location and volunteer availability, there may be potential for conflicts with the Oral Examiners. There are also cost and geographic considerations that sometimes make it difficult to provide examiners.

The policy and procedures around the Log Book could be improved to reduce administrative activity. The Oral Exam could be eliminated and its intent covered by other methods. In some instances Written and Oral Exams are being offered on demand and with some planning around timing and delivery could greatly reduce unit costs.

Ongoing Continuous Professional Learning activity (CPL) is required by professionals to stay current and develop the necessary competencies to support their career management plans. Ongoing certification of professional members is often linked to a prescribed maintenance of certification requirement. If the requirement is formally regulated by a by-law of the association it will strengthen the quality of the membership and the perception of the profession. If the requirement is not formally regulated, the onus is on the member to comply with ethical references that address competence. For example, CIP By-Law , Schedule B, 3.1 provides that CIP members shall:

“Take all reasonable steps to maintain their professional competence throughout their working lives and shall comply with CIP’s continuing professional learning requirements as amended from time to time.”

In an environment where individuals and organizations are moving to reduce risk, enhancements to professional standards and professionalism are seen as key elements of a risk management strategy. Accordingly, professional associations are looking to improve their CPL requirements. The most successful approach to implementing CPL requirements is to keep the reporting processes simple and phase in upgrades.

Improvements to certification standards and related criteria will enhance the quality of members. It may, for the short term reduce, the number of new members, and during the transitional period prior to new arrangements coming into effect cause a surge in candidates hoping to be certified under the old arrangement.

4.3 NEW HORIZON

The certification standards are adopted by all CIP Affiliates and applied uniformly across Canada. The education criteria require candidates pursuing the professional designation to have a university degree and complete prescribed courses in the Professional Education Program. Courses required are based on the National Competency Standards. Completion of a bachelors or masters degree in planning recognized by the National/Affiliate Standards Committee will result in advanced standing in the Professional Education Program.

Courses required for the Professional Education Program are available through university programs, with the exception of the course in “Planning Developments and the Profession”. This course helps to integrate various competencies, address ethical issues and practices, and explore other professional issues and current and future practice developments.

This course is seen as valued added beyond a recognized university degree in planning and is considered an important part of becoming a professional planner.

Individuals who do not have a recognized planning degree but have a degree in a field related to planning will be required to complete or have credit for all the courses required for the Professional Education Program. Should these individuals have more than seven years in responsible planning experience, they have the option to try to obtain advanced standing in the Professional Education Program using the PLAR (Portfolio) route. Depending on the quality of their Portfolio in relation to the National Competency Standards, advanced standing may exempt them from some or all required courses, and possibly from writing the National Professional Exam on an interim basis (Up to September 1, 2008).

The minimum standard for responsible planning experience is three years of Canadian experience. For some candidates it will take more than three years to get the required work experience. The Work Experience Criteria calls for a progressive element and relates to the definition of planning. There is a distinction between planning experience and technical/administrative support for planning experience. Candidates are responsible to review the guidelines for responsible planning experience and maintain a log book for submission at the time of application for professional membership. A submitted log book will require the signatures of three professional members attesting to the fact that the experience logged has met the criteria as established. The three professional members must not be employed by the candidate's organization.

Staff and/or the delegated committee review the applications for professional membership as to compliance with standards and policy and forward those that have met the requirements to the Council for approval. Where questions arise in terms of practical experience eligibility, questions will be directed to the sponsors for clarification.

All candidates for the professional designation must write the National Professional Examination. It is possible to write the examination prior to having met the practical work experience requirement.

The Institute on behalf of the Affiliates uses a National Board of Examiners to set the exams, develop exam policy and processes, mark exams with trained volunteers and report on results. The exams are considered reflecting the competencies are considered rigorous, but fair.

Candidates for the professional designation are reminded of professional responsibilities and on their application attest to their willingness to abide by the Standards of Ethical Conduct and comply with Continuous Professional Learning Criteria as prescribed by Affiliates of CIP.

4.4 IMPLEMENTATION

Activities

Education Criteria

- A Task Force is established by the National/Affiliate Membership Committee to review the National Competency Standards and determine which courses will be part of the professional Education Program.
- Establish advanced standing policies for universities in Canada.
- Determine competency and related curriculum requirements for a value added course "Planning Developments and the Profession".

- Oversee development of the course materials for In-class and Online delivery formats.

Practical Work Experience Criteria

- A Task Force is established by the National/Affiliate Membership Committee to take the Practical Work Experience Criteria and make adjustments to the existing policy and procedures based on the approved recommendation.

Examination Criteria

- The Establish a National Board of Examiners to develop exams based on the National Competency Standards.
- The Board will develop related policy and procedures for exam bank questions, candidate instructions, administration, delivery, marking, and reporting.
- Wind down the current arrangements by September 1, 2008.

PLAR Criteria

- A Task Force is established by the National/Affiliate Membership Committee to take the current Portfolio policies and convert them to a Prior Learning Assessment Recognition Policy based on the National Competency Standards and include a requirement for a minimum of seven years of progressive responsible planning experience.
- Develop procedures to support the policy and possible examples showing different advanced standing situations for a Candidate. The situations could require additional courses and writing the exam; additional experience and writing the exam; and only writing the exam.

Internal Linkages

- The Task Force will work with other groups as linkages are required.

Timelines

- The work of these Task Forces will result in new policy and procedures and revised and new content. This work will need to be completed in time to implement the new criteria and the new professional program course and professional exam. (By June, 2008, for September 1, 2008, delivery.)

Resources

- Volunteer review and development time
- Staff coordination
- Travel expense for the Task Forces and National Board of Examiners
- Course development costs
- Exam development costs
- Adjustments to websites and articles and other literature to promote the revisions

Performance Indicators

Education Criteria

- List of courses in the Professional Education Program
- List of courses and university equivalents for advanced standing
- Course outline for “Planning Developments and the Profession”.
- In-class and Online Course Participant and Instructor Guides

Practical Work Experience Criteria

- Revised Practical Work Experience Criteria with supportive policy and procedures

Examination Criteria

- National and Affiliates develop and agreement to establish a National Board of Examiners and put the Board in place
- Exam development, delivery and marking policies and procedures in place
- The last Oral and Written Examinations under the old arrangement are delivered in June, 2008

PLAR Criteria

- Prior Learning and Assessment Policy and Procedures
- Examples to help support awareness of situations

5. Ethical

5.1 RECOMMENDATIONS

- 1. Review the existing Code of Professional Practice with a view to ensuring the existing provisions reflect current legislation and the work environment.*
- 2. Adjust the CIP Statement of Values and Code of Professional Practice to Standards of Ethical Conduct and provide a supportive administration document.*
- 3. Develop guidelines for suggested disciplinary disclose policy and develop interpretations to the standards as required.*
- 4. Provide ethical learning activities as part of the professional program and an evaluation component.*
- 5. Establish a Task Force to help bring all Affiliate Standards of Ethical Codes to a common basis, where possible. Have the Task Force develop guidelines for disciplinary disclose activity. In addition, explore the feasibility of developing interpretations to the standards based on disciplinary decisions and interpretations based on member, public or employer inquires.*
- 6. Affiliates, where necessary, should upgrade their websites to promote the fact they have Standards of Ethical Conduct and an administration process for complaints.*
- 7. Have all members sign the membership application form stating that they will subscribe to the Standards of Ethical Conduct.*
- 8. Consider the option of having members living outside of Canada assigned to Affiliates and sunset the CIP National Disciplinary Committee and assign review and improvements responsibilities for this area to the National/Affiliate Membership Committee.*

5.2 CURRENT SITUATION

Ethical standards are a key element that distinguishes professionals from non-professionals. Professionals subscribe to ethical standards and hold themselves accountable to the public based on their adopted principles and responsibilities.

The Institute has in place a CIP Statement of Values and Code of Professional Practice. This standard provides a Statement of Values which is to serve as a source of inspiration and guidance for professional planners in Canada. The Code forms the basis of planning practice by members. It is enforceable through disciplinary provisions of the national membership by-law or through the complementary Code of Practice and by-laws as may be adopted by the Institute's affiliates. It is possible to build the listed values into the Code of Practice and reduce any confusion around the Values and Code.

Current provisions allow the Institute to take international membership applications. By having direct international applications there is an expectation that the Institute will deal directly with individuals on ethical matters. This type of activity calls for the establishment of structure and resources to inform, educate, and administer ethical matters. In addition, the Institute plays a coordinating role in working with the Affiliates to establish national standards in this area.

A practice often used by other professional associations is to have international members attached to an affiliate based on their last place of residence, where they will move to, or personal preference. Affiliates often agree on the amount of dues for international members. Is there a need for a National Disciplinary Committee? Responsibility for Standards is often assigned to a National Standards Committee, Professional Services Committee, Certification and Accreditation Committee or other similar committees with a broader mandate. If the policy is to review the ethical standards every five years, then the committee will usually strike a task force as required.

Affiliate websites references to the fact that a Code of Professional Practice exists is limited and the Code is not always available in the public domain area. The fact the professional group has a Code is a positive attribute. It should be promoted and made convenient for those contemplating a complaint against a member.

In some cases Affiliates have endorsed the full CIP document and in other situations have modified the document. For example, one Affiliate has eight provisions under 3.0 The Planner's Responsibility to the Profession, and the Institute version has 14 provisions. One Affiliate is not even using the framework that makes it easier for the public and members to understand the ethical relationship and responsibilities to the public interest, clients and employers, the profession and other members. While each Affiliate has the authority to establish their own code, where possible, it is in the best interest of the profession to align provisions that are linked to competencies, learning activity, portability and public perception and understanding

If the media, employer, client or a member of the public were to examine the Codes of the Affiliates they may raise questions. Why do you have to comply with some provisions in one province and not another? Why are they not the same? Shouldn't a profession's standards be uniform throughout the country?

Are Affiliate processes to support administration of their Code adequate? Information with respect to discipline or the administration of the Code of Professional Practice is limited. In some cases the process for disciplinary activity is spelled out in regulations. As a member of the public viewing website content may find limited direction or advice on how to bring an ethical complaint before the Affiliate. Information gathered through discussions indicated that complaints are rare, or there should be more, or there is uncertainty in this area. There appears to be no common approach to the disclosure of decisions regarding complaints and decisions made.

Recognition of university planning programs is based on guidelines for minimum standards for program content. The standards as outlined in the Membership Manual Volume 3 Recognition of University Degrees calls for specific knowledge components, ethical values component and the planning work experience. The ethical values component indicates as follows:

“The planning program shall provide students with the basis for becoming ethical practitioners who are aware of and responsible for the way that their activities affect and promote ethical values. The program shall provide students with and understanding of the importance and effects of the *Statement of Values* attached of the Canadian Institute of Planners. This should be discussed in courses in the planning program. A separate course is not required.”

It is possible that some members could obtain their professional designation with limited exposure to learning about ethical topics and issues and evaluation thereof. It is also possible that one could become a professional planner without reading codes established by their Affiliate and without agreeing to comply with the codes. Professional programs offered post-university by professional associations often provide value added education which usually includes ethical topics.

There appears to be a trend in the use of terminology in this area, where the description “Code of Ethics is being replaced with Standards of Ethical Conduct”. It is a slow trend as most professional groups tend to visit this area every five to ten years for updating, and ten or more years for major overhaul.

Opportunities exist to improve the ethical standards, development, application, related administration, education and public awareness.

5.3 NEW HORIZON

The planning profession has aligned ethical standards in Canada. The standards are part of the certification processes where aspiring professionals learn about ethical topics and are evaluated on their understanding of these topics. The use of guidelines and interpretations assist with learning activities and reduce uncertainty around the application of ethical standards.

The public close to the profession is aware that this professional group has ethical standards, have easy access to the ethical standards, and clear methods of laying complaints. Guidelines support the reporting of disciplinary activity to members, and perhaps, the public.

5.4 IMPLEMENTATION

Activities

- A Task Force appointed by the National/Affiliate Membership Committee is used to work on recommendations for this area.
- Work of the Task Force, through the National/Affiliate Membership Committee, will be provided to the Institute and Affiliates for comment prior to final consideration by the CIP Board.
- Affiliates, as required, will revise their websites to promote the availability of the Standards of Ethical Conduct, how they are administered, and how one can lay a complaint.

Internal Linkages

- The Task Force will work with other groups as linkages are required.

Timelines

- The work of the Task Force will result in revised and new content. This content will need to be completed in time to be part of the new professional program course and professional exam. (By June 2007)

Resources

- Volunteer review and revision time
- Staff coordination
- Travel expense for the Task Force
- Affiliate website adjustments

Performance Indicators

- Updated Standards of Ethical Conduct and Administration
- Guidelines for Disciplinary Activities
- Ethical content is placed in the professional course
- Professional exam tests on ethical topics
- Revised membership application forms
- Improved references to the Standards of Ethical conduct on websites
- Where feasible, interpretations of the standards

6. Accreditation

6.1 RECOMMENDATIONS

- 1. Develop a formal accreditation program that reflects the National Competency Standards and the advanced standing requirements (program/course) for the Professional Education Program and the professions commitment to developing Canadian university planning programs.*
- 2. Deliver accreditation services on a shared services basis with one service delivery point and provide training to program reviewers.*

6.2 CURRENT SITUATION

Provision 8 of Schedule A of the CIP By-law provides for the recognition of degrees. Specifically it can grant graduates with recognized planning degrees an exemption from the Institute's written examination requirements. Affiliates are responsible for assessment of planning programs and are to conduct an annual review. A national committee is required to maintain liaison with Affiliates on matters of degree recognition to ensure a consistent national standard. Other specifics related to recognition of the programs and faculty requirements are specified. Course content must address substantive planning knowledge: process, content context and role. Skills as determined from time-to-time by Council must be addressed in course content.

The CIP Membership Manual, Volume 3 provides guidance for the recognition of university degrees. Policy and procedures address criteria, knowledge components, skills component, ethical value component, and planning work experience. A Guide for a Site Visit Committee, list of recognized planning programs and an Application for Recognition of University Degrees are also provided.

Is this arrangement meeting current needs or does CIP need to establish a more comprehensive and formal accreditation process? In the fall of 2005 a report was tabled with National Council. "CIP Accreditation: a review and recommendations. This report prepared by David Witty FCIP does a good job of assessing the current situation and provides recommendations. Recommendations support having a Task Force work with the Association of Canadian University Planning Programs, build on emerging processes in Canadian undergraduate and graduate degree reviews and the APA Planning Accreditation Board's recent changes. The report supports CIP and its Affiliates moving to a more formal accreditation policy and process.

The development of National Competency Standards for the profession and having advanced standing processes will have an impact on recognition and accreditation activities. This leaves a situation where things are in a state of flux and movement to a more formal accreditation policy and process at this time is contingent on other factors occurring.

Based on discussions with stakeholders it appears the application of the Recognition of University Degrees as provided by the Membership Manual varies amongst Affiliates and improvements are possible. Concerns about revenue, cost, potential for conflict and getting trained volunteers were expressed.

Accreditation in Canada is often through a shared services approach despite the fact that under the Canadian constitution, education and licensing for professional practice fall within the jurisdiction of each of the provinces and territories. However, the desire to keep costs down and for uniform standards and reciprocity has resulted in arrangements to ensure comparable levels of education across the country and quality delivery of accreditation programs. Service level agreements support this type of arrangement. For example, the Canadian Architectural Certification Board (CACB) has the responsibility for accrediting professional degree programs in Canadian university schools of architecture.

6.3 NEW HORIZON

The Institute and its Affiliates have an interest in the university system as it plays a key role in providing educational courses to support competency development for the professional planner. A formal accreditation program is used to identify the knowledge and skills that professional planners require, and to require that degree programs include these as a condition of recognition.

Students looking to become planners seek out universities that have been accredited by CIP and its Affiliates and will consider the university programs that provide the greatest level of advanced standing towards the Professional Education Program. The choice of universities may be influenced by university program pass rates on the National Professional Exam.

A team of expert reviewers is used to provide one service delivery point for accreditation reviews across Canada. This approach minimizes costs and improves quality in the delivery of accreditation services.

6.4 IMPLEMENTATION

Activities

- A Task Force appointed by the National/Affiliate Membership Committee will review final decisions and approvals based on the results of the Membership Continuous Improvement Project.
- The Task Force will develop a formal Accreditation Program.
- The Task Force will develop a business case to operate one service delivery point for delivery of the Accreditation Program.

Internal Linkages

- The Task Force would work with the National Competency Task Force and other groups as linkages are required.

Timelines

- The Competencies Task Force is to complete their work by March 2007 and the formal Accreditation Program should be finished for consideration by September 2007.
- The business case for single point delivery should be completed by September 2007.

Resources

- Volunteer review and revision time
- Staff coordination
- Travel expense for the Task Force

Performance Indicators

- A formal Accreditation Program in place
- A cost effective and efficient method of delivering quality accreditation services
- Universities connecting curriculum to competencies

7. Reciprocity and Non-Residents

7.1 RECOMMENDATION

- 1. Develop an international equivalencies policy and allow members of the AICP and RTPI exemption from the Professional Educational Program. After one year of Canadian experience ACIP and RTPI members will be eligible to challenge the National Professional Examination. As part of the policy, other non-residents with professional planning credentials wishing to obtain the RPP professional designation must meet the prescribed certification standards. They will have the option of completing the Professional Education Program requirements or try to have their Prior Learning Assessment Review Portfolio approved as equivalent.*
- 2. To ensure consistency in the application of the international equivalencies policy and minimizing costs, administration of the policy and procedures for this area should be on a shared services basis with one service delivery point.*

7.2 CURRENT SITUATION

Applications for membership in CIP are received from graduates of CIP recognized planning programs who are not working in Canada or are deemed non-residents. Applications are also received from non-residents who are members of a professional planning association from other countries or are planners from countries where there is no recognized professional planning association.

Applicants with recognized degrees must provide certified transcripts and arrange for direct supervision by a professional member of CIP, AICP or RTPI. An Oral Examination must be completed with an Affiliate. Candidates without two years of responsible planning experience in Canada will also be required to complete a Special Written Examination. The one hour Special Written Examination is intended to examine the candidate's understanding of the Canadian planning system. These candidates are provided with a special reading list.

By-Law Schedule A – National Membership Criteria provides that an affiliate may elect a member of the profession of another country to be a Member if he/she has met the following requirement:

Who is a full member in good standing of the professional planning organization of another country, which organization is recognized by the Institute as having equivalent membership standards, and who has successfully fulfilled the examination or portfolio requirements of the Institute.

Following is a list of the planning professions of other countries recognized in the above clause:

- American Institute of Certified Planners (AICP)
- Royal Town Planning Institute (RTPI)

If an application is received from an individual who resides in a country where there is a “recognized equivalent profession” he/she should join the profession in that country first and then apply to a CIP Affiliate. An exception to this situation occurs when the applicant has either a Canadian Degree or Canadian experience.

Applicants from countries where there is no recognized professional planning association must have a “Canadian connection” such as previous residence, citizenship, work experience or education. Those with unrecognized planning degrees will require four years of responsible planning experience and must complete the Written and Oral Examination.

Policies and processes for the evaluation of foreign degrees are detailed in the CIP Membership Manual Volume 2. There are no international standards for planning education. All foreign degrees are considered “related to planning” and therefore require a minimum of four years of responsible planning experience.

Foreign degrees must be verified prior to making an application. Information on two organizations that provide a verification service is supplied. The verification certificate must be part of the application. The verification is used to ensure that the process is fair and rigorous.

In recent years concerns have been expressed, both by foreign trained individuals and, and more recently, governments, that Canadian standards need to change to reflect prior education and experience received outside Canada. For example the College of Physicians and Surgeons of Manitoba require that all International Medical Graduates meet the same licensing requirements and it has established conditional registration requirements and a Medical Licensure Program for International Medical Graduates.

The Institute wants a fair and timely membership process that applies consistent and high standards for all applicants while remaining adequately transparent and avoiding barriers to labour mobility.

7.3 NEW HORIZON

The international equivalencies policy provides guidance in the processing of applications from non-residents and residents with international qualifications. Applicants with more than seven years of planning experience who are not a member of a recognized planning organization are more likely to use the PLAR option. Applicants with less than seven years of planning experience and who are not a member of a recognized planning organization will follow the regular route to certification.

Applicants with at least one year of Canadian responsible planning experience and who are a certified member in good standing with AICP or RTPI are able to challenge the National Professional Examination. Arrangements to recognize other planning organizations are not required as the international equivalencies policy addresses applications from non-residents and residents with international qualifications.

7.4 IMPLEMENTATION

Activities

- The National/Affiliate Membership Committee to revise the Membership Manual to reflect policy and process changes based on the approved recommendations.
- Arrange for appropriate notice and materials to reflect new requirements and arrangements for administration.

Internal Linkages

- National/Affiliate Membership Committee and Affiliate Membership Committees will work with other groups as linkages are required.

Timelines

- The policies and processes should be implemented by September 1, 2008, at the latest.
- The business case for single point delivery should be completed by September 2007.

Resources

- Volunteer review and revision time
- Staff coordination

Performance Indicators

- Revised International Equivalencies Policy and Processes supporting consistent and high standards and labour mobility
- Efficient and effective policy and process that is fair, timely and transparent

8. Legislation

8.1 RECOMMENDATION

1. *Establish the Registered Professional Planner (RPP) as the preferred professional planning designation in Canada.*
2. *Develop an Affiliate/ Institute strategy that provides for a coordinated approach to establishing and revising legislative and regulatory provisions to support consistency with the designation and other agreed-to national standards or legislative challenges.*

8.2 CURRENT SITUATION

Five Affiliates have some form of legislation. It is expected that others will eventually seek and obtain regulated status. The legislation in place does not appear to be as uniform or consistent as legislation held by many other professional groups. Alignment between jurisdictions in a professional association is a result of all jurisdictions initially presenting similar documentation, or deciding the preferred requirements that should be in place, and pursuing amendments.

One provincial government may adjust regulations that could have an impact on a professional association's national standards. Legislation can influence membership standards and membership growth. For example, labour legislation could influence certification processes and who becomes a member. If a professional association has its designation named in provincial legislation as a requirement in terms of some form of reporting or authorization, it will attract those in planning in the province who have not pursued professional standing.

If legislative adjustments are not consistent with the direction the profession would like to go, the national organization, with the blessing of affiliates, usually works with the concerned provincial affiliate to advocate against unwelcome changes. If the proposed adjustment is positive for the profession, then the national organization will communicate this information to Affiliates and encourage discussion and development of related strategy.

Generally, governments have not gone out of their way to get involved in professional standards or criteria for certification unless there is a need to protect the public. Then it may dictate a licensing requirement or enhanced legislation. In the last fifteen years there has been limited licensing activity. There has been legislation establishing health colleges in some provinces but very little other activity. There would have to be considerable public concern to have governments establish licensing for a professional group.

There is some concern amongst professional groups that governments may get involved in requiring professional associations to adjust admission standards to accommodate those with international qualifications but no Canadian experience.

Before Affiliates even consider pursuing licensing, alignment of existing legislation is required. In addition, it is necessary to ensure the Institute and Affiliates have a fairly uniform name and strong brands that clearly position awareness.

8.3 NEW HORIZON

Right to title legislation for planning exists in all provinces and territories. The legislation is fairly uniform and supports the profession's national standards. Planners are also named in municipal legislation and work is under way for them to be named in other profession related legislation.

A contingency legislation action policy and plan is in place to support advocacy and provides for a proactive approach. Affiliates monitor legislation and pending government direction to determine if there are any potential impacts on the planning profession. The Institute receives this information from each Affiliate and shares it with other Affiliates. Action steps, along with responsibilities to support advocacy on legislative matters, is documented and ready for any necessary roll out.

Strategy and related templates are used to pursue legislative changes. Volunteers and staff who are charged with advocating on legislative matters receive supportive training.

8.4 IMPLEMENTATION

Activities

- A Task Force appointed by the National/Affiliate Membership Committee is used to develop strategy and plans to align legislation throughout Canada.
- The Task Force develops consensus amongst Affiliates and presents its strategy and plans to the Institute for approval.
- A legislative action policy and plan to support advocacy is developed

Internal Linkages

- The Task Force will work with other groups as linkages are required.

Timelines

- Determine the preferred legislative strategy including designation, names, etc. by December 31, 2006.
- Obtain consensus amongst Affiliates by June 30, 2007.
- Initiate plan to align legislation on September 1, 2007.

Resources

- Volunteer review and strategy and plan development time
- Staff coordination
- Travel expense for the Task Force
- Legal and advocacy advice.

Performance Indicators

- RPP is the brand for professional planners in Canada
- Legislative changes occur to align standards
- Legislative action plan and policy in place to support advocacy

9. Membership

9.1 RECOMMENDATION

- 1. The Provisional Member class be renamed Candidate.*
- 2. If RPP is accepted as the professional designation for planners in Canada, the description and initials for the Fellowship designation should be reviewed and consideration be given to using FRPP.*
- 3. If the RPP is accepted as the designation for the profession, the College of Fellows should be asked to provide input on the need to change the fellows designation to FRPP or stay with FCIP, and review and update criteria for becoming a fellow.*
- 4. An online by-law, policy and procedures orientation package be developed for staff and/or volunteers to provide guidance to assist with fulfilling specific roles and responsibilities.*
- 5. Change the name of the National/Affiliate Membership Committee to the National/Affiliate Standards Committee and continue to use the committee to promote the effective use of resources in membership administration and related operations for CIP and Affiliates, and address related issues, and reduce variances to maintain and develop standards that are rigorous, consistent and fairly applied.*
- 6. When revising the Institute By-Law to meet new legislative requirements, adjust the By-Law to be less prescriptive and make more use of policy statements or regulations.*
- 7. Explore the use of new technologies and business arrangements to reduce the costs of serving members.*

9.2 CURRENT SITUATION

The territory of the planning profession is influenced by the definition of planning. Those who are educated in and/or practice in the territory are eligible to become members and work towards their professional designation. Individuals working towards their professional designation have been categorized as Provisional Members. To become a Provisional Member, the Affiliate Membership Committee verifies the applicant's academic training, and that if the applicant has no recognized planning degree he or she is engaged in a job in the planning field. The Affiliate Membership Committee meets the candidate to clarify the process, establish collegial contacts, and discuss the meaning of professionalism. In effect, if one wants to become a professional planner and become a member, he/she first need to have a job in planning or have a recognized degree. The entrance requirements to get on the track to becoming a professional are similar to those in other professional groups.

The membership categories most used to describe aspiring professionals is “student” or “candidate”. There are others such as “Inten” or “Engineer-in-Training”. These are not used by many groups.

Use of the provisional membership category tends to imply that an individual is “almost there”, he/she has met requirements and the granting of the designation is conditional on some event such as Council approval. It does not imply that an individual is still involved in a learning process with other criteria to achieve. The name is not consistent with the terminology most used and understood by employers. It should be noted that the CIP Membership Manual uses candidate in reference to examinations.

Fellowship designations can be earned or awarded. The planning profession awards the designation by a vote of the Fellows Nominating Committee. Fellowship may be awarded to a member who has been in good standing for a period of not less than ten years, and has, in the opinion of the Committee, made an outstanding contribution to planning, including a raising of standards in planning at the national level, has done work that is exemplary, and who has been nominated in writing by at least six Members from more than two affiliates. Fellows use the FCIP to distinguish their status.

In addition to outstanding service to the profession, a good number of fellows programs also require outstanding service to the community. Some fellowship designations are linked to the name of the organization and others are linked to the professional designation (e.g. FCA to describe a Chartered Accountant (CA) who is a Fellow with the Canadian Institute of Chartered Accountants or FRCPS to describe a Medical Doctor (MD) who is a Fellow with the Royal College of Physicians and Surgeons.

If RPP is the professional designation for planners in Canada it would be possible to use either FRPP or continue to use FCIP. Some professional groups would prefer the FRPP as it is linked to a brand and would not be as confusing, whereas others may want to stay with tradition and have FCIP remain as the fellows designation.

The work of the National/Affiliate Membership Committee and Affiliate Membership Committees is quite different from the work of Membership Committees in other professional organizations. In other professional organizations, Membership Committees normally address product and service issues and Committees that do the work of the CIP National Membership Committee are often described differently. They may be described as the Certification and Accreditation Committee, or National/Affiliate Standards Committee, Professional Standards Committee, or Professional Services Committee.

The current CIP By-Law has a number of Schedules attached. Each time changes are required, an amendment to the By-Law is required. A current trend is to keep By-Laws general and not prescriptive. Most of the information in the Schedules can be treated as policy and supportive procedures and are approved by the Council. A Policy Manual such as the Membership Manual is used to record and track policies and, more often, is available on the website.

Each Affiliate is separately incorporated with its own by-laws. When Affiliates and the Institute make amendments in terms of membership it is important that each Affiliate understand the amendments and proceed to make the required by-law amendments. Failure to make amendments will eventually erode national standards.

Communications and, if necessary, training, to support understanding of by-laws, policies and procedures is an ongoing requirement to support volunteer turnover. If this does not happen there is a risk that consistent application of policies will not occur, and roles and responsibilities may become blurred.

Legislation that will create a new Canada Not-For-Profit Corporations Act and replace Part II and Part III of the Canada Corporations Act under which CIP is incorporated is expected. The new legislation may provide clearer direction as to what should be in a by-law as opposed to a policy. It is expected that that CIP and others will be required to file Articles of Incorporation with Industry Canada to obtain corporate status under the new Act, and overhaul its by-laws to conform to the new Act.

Technology is available where an association can maintain a web based membership database. The database will allow for tracking in professional programs, as well as routine membership profile information. Members with a password can update their records and even pay membership dues or fees online. New technologies are reducing the cost of processing membership information. Some smaller professional associations see the value in having one service delivery point and are migrating to a common back office website database. Common membership information is available on demand by National or Affiliate organizations. Other professional associations have not yet caught on, and it is not uncommon for three or more Affiliates and the National organization to buy the same technology when they could have signed a service level agreement that would support a shared services arrangement. This duplication could have been avoided and the members' dues could have been used for program and service priorities.

Different arrangements to handle back office services or program delivery do not necessarily mean changes to governance roles and responsibilities and structure. While it is possible to change assigned governance roles and responsibilities and structure to handle technology arrangements, member services, or exam development and delivery, it is not often necessary. Affiliates, through service level agreements, can delegate responsibility for matters to others, be it another Affiliate or the Institute. This is not a unique situation if one considers that most provinces assign the responsibility for income tax collection to the federal government. In the association world it is not uncommon for Atlantic jurisdictions to operate one service delivery unit.

Professional associations are starting to understand that they are only as strong as their weakest link. Weakest links are not necessarily related to the size of membership. When it comes to meeting member expectations and the delivery of services, the following indicators can be used to measure success:

- Responsiveness
- Cost effectiveness and efficiency
- Accessibility
- Expediency
- Uniformity
- Quality

These indicators can help align a professional association and improve the weakest links.

9.3 NEW HORIZON

The National/Affiliate Standards Committee plays a key role in developing and monitoring standards that are rigorous, consistent and fairly applied. By-Laws and policies are documented on the website, and are easily accessible and understood. Variances from application of standards are minimized by training and communication activities for volunteers and staff. The committee uses Task Forces and appoints committee members-at-large with specialized competencies to help carry out its mandate.

Candidates are fairly aggressive in their efforts to achieve the RFP professional designation as soon as possible to further their careers.

Technology and service level agreements are used to minimize the cost of serving members and ensuring services provided rank above average in terms of responsiveness, cost effectiveness and efficiency, accessibility, expediency, uniformity, and quality.

9.4 IMPLEMENTATION

Activities

- Amend the Institute and Affiliate By-laws to change “Provisional Member” to “Candidate”.
- If RPP is accepted as the national professional designation for the profession, a Fellows Nominating Committee or a Task Force be assigned to consider the use of FRPP as the Fellowship designation and review and update the criteria for fellowship.
- The Staff Group (Institute and Affiliate) develop a framework for an online orientation package. Institute staff develop/gather content for the package.
- The Institute and Affiliate Councils consider changing the name of the membership committees.
- When required, the Institute Council revise the By-law to become less prescriptive and move to the policy and regulations approach.
- The Staff Group be assigned responsibility to explore how technologies and shared services arrangements can reduce the costs of serving members.

Internal Linkages

- The Staff Group, Fellow Nominating Committee and Councils work with other groups as linkages are required.

Timelines

- Change “Provisional” to “Candidate” by September 1, 2007.
- If necessary, change the Fellow designation by September 1, 2007.
- The online orientation package should be completed by June 30, 2007.
- By-Law amendments along with other required changes are completed by June 30, 2007.
- Complete the use of technologies and serving members review by December 31, 2007.

Resources

- Volunteer review and revision time
- Staff coordination and analysis

- Travel expense for the Staff Group
- Legal and advocacy advice.

Performance Indicators

- Fellowship designation connected to RPP
- Candidate is the new description for those aspiring to become professional planners
- Updated online orientation package is available to support training and communications
- By-laws do not require frequent amendments
- A report identifies ways to use technologies to reduce or minimize the cost of serving members
- The National/Affiliate Standards Committee meets the expectations of the Institute and Affiliates

4. Summary

As the profession continues to grow, there is a need for the national and affiliate organizations to reposition it to be more dynamic and relevant. In order to be relevant, the profession must meet members' future expectations and must position itself for future growth. This requires enhanced standards and credibility and ways and means to make best use of available resources.

The Institute and Affiliates need to develop greater efficiencies in delivering services to members and need to make better use of the many hardworking volunteers who are committed to the profession's future.

Some may consider this report a paradigm shift for the association. The recommendations in this report call on the profession's leaders to stop tinkering and start to make incremental and transformative change in the best interest of the profession and its future members. To explore and implement these recommendations will require the profession's leaders to be open minded, prepared to assume responsibility for stretch goals, and provide dynamic leadership. It will take considerable effort and resources to move forward. It is not for the faint of heart.

The report is asking many long-time, valued, experienced members of the profession to see the new horizon and start channeling their efforts from sustaining the profession to invigorating and growing it for themselves and future members. Redirecting these talents and energies towards advancing the proposed changes will ensure success.

The recommendations will provide an opportunity for the profession to advance itself reputationally, organizationally and administratively. In turn, the identified performance indicators, when met, will result in outcomes whereby the profession will be better at what it does and will be considered "state of the art", and members will have a sense of belonging and will be proud to be members. The profession and its members will be more proactive and able to respond to challenges from professional environments.

Summary of Key Recommendations

- Develop new comprehensive Affiliate Agreements
- Develop an Internal Trade Mutual Recognition Agreement
- Develop National Competency Standards
- Rename Provisional Members as Candidate Members
- Update Certification Standards to include:
 - Candidates must have three years experience in a planning capacity, not in a technical/administrative support role, and must have three sponsors;
 - The Oral Examination will be replaced;
 - Candidates must pass a National Professional Exam;
 - Candidates must agree to abide by ethical and CPL standards;
 - Educational requirements are to be bundled into a Professional Education Program with a new professional course being developed and delivered;
 - A Board of Examiners would be established with one service delivery point;
 - There will be transitional provisions;
 - PLAR arrangement for those with more than seven years experience; and
 - A recognized four-year university planning program will get the highest level of advanced standing in the professional program.

- The new Certification Standards will take effect on September 1, 2008
- Updated Standards of Ethical Conduct and administration protocol will be developed
- Ethics will be part of the Professional Education Program
- Out of country members will be assigned to Affiliates
- Go from university recognition policy to a formal Canadian accreditation program with one service delivery point
- Put an international equivalencies policy in place with one service delivery point
- AICP and RTPI members with one year of Canadian experience will be able to challenge the National Professional Exam
- RPP will become the professional planning designation for Canada
- Develop an overall legislative strategy for the planning profession
- Review the Fellows designation FRPP or FICP and review and update criteria
- Develop online orientation, training, and communication enhancements
- National/Affiliate Membership Committee will become the National/Affiliate Standards Committee
- Use technologies to reduce the cost of serving members

These recommendations are perhaps aggressive and in some situations beyond current needs or capacity. However, the role of leaders is to plan for the future and develop new horizons to advance the profession. These recommendations should be examined carefully with a view to investing in the future of the planning profession in Canada.

Appendix A – Becoming a Professional Planner

The following information is provided to help decision makers understand how one could become a professional planner should the recommendations be implemented. Information is provided for the following:

- Those with a recognized Planning Degree and Canadian Experience (Regular Route)
- Those with a Canadian Non Planning Degree with Canadian Experience (Special Arrangement #1)
- Those with a Professional Designation and in Good Standing with the AICP and RTPI (Special Arrangement #2)
- Those with an International Planning Degree or Related Degree with or without Canadian Experience (Special Arrangement #3)

Professional Certification Route for Those with a Recognized Planning Degree and Canadian Experience (Regular Route)

1. Complete the application to become a Candidate member and attach proof of your degree and transcripts of courses for advanced standing in the Professional Program. A four year recognized planning degree is preferred to get the maximum advanced standing.
2. If the Candidate has not successfully completed all the required courses they will be advised and the additional courses noted.
3. If the Candidate has successfully completed all the required courses they will be eligible to enroll in the Developments in Planning Professional Program course.
4. If the Candidate is not successful in completing this course they will be required to retake the course until they are successful.
5. If the Candidate is successful in completing this course they will be eligible to write the professional exam.
6. The Candidate will apply to write the professional examination.
7. If the Candidate is not successful in passing the examination they will be required to rewrite the examination at a future date.
8. If the Candidate is successful in passing the examination they will be notified that they are eligible to complete an Application for Professional Membership.
9. The Candidate will submit their Application for Professional Membership and include: a Record of Practical Work Experience with a minimum of three years of responsible Canadian planning experience; signed agreement to abide by the standards of ethical conduct and CPL requirements; and the signatures of three sponsors.
10. Completed applications will be submitted for consideration and approval.

Professional Certification Route for Those with a Non Planning Degree and with Canadian Experience (Special Arrangement #1)

1. Complete the application to become a Candidate member and attach proof of your degree and transcripts of courses for advanced standing in the Professional Program.
2. If the Candidate has not successfully completed all the required courses and has more than seven years of responsible Canadian planning experience they have the option to try to obtain advanced standing using the PLAR (Portfolio) route. Depending on the quality of their Portfolio in relation to the National Competency Standards, advanced standing may exempt them from some or all required courses.
3. If the Candidate has not successfully completed all the required courses they will be advised with the additional courses required noted.
4. If the Candidate has successfully completed all the required courses or an equivalent approved Portfolio, they will be eligible to enroll in the Developments in Planning Professional Program course.
5. If the Candidate is not successful in completing this course they will be required to retake the course until they are successful.
6. If the Candidate is successful in completing this course they will be eligible to write the professional exam.
7. The Candidate will apply to write the professional examination.
8. If the Candidate is not successful in passing the examination they will be required to rewrite the examination at a future date.
9. If the Candidate is successful in passing the examination they will be notified that they are eligible to complete an Application for Professional Membership.
10. The Candidate will submit their Application for Professional Membership and include: a Record of Practical Work Experience with a minimum of three years of responsible Canadian planning experience; signed agreement to abide by the standards of ethical conduct and CPL requirements; and the signatures of three sponsors.
11. Completed applications will be submitted for consideration and approval.

Professional Certification Route for Those with a Professional Designation and in Good Standing with the AICP and RTPI (Special Arrangement #2)

1. Complete the application to become a Candidate member and attach proof of your membership in good standing and professional designation with AICP or RTPI.
2. If the Candidate has one year of responsible Canadian planning experience they will be eligible to challenge the examination and need to submit a Record of Practical Work Experience documenting the experience along with an application to write the professional exam.
3. If the Candidate does not have one year of responsible Canadian planning experience they will be required to get the required experience before writing the examination.
4. Candidates are recommended to take the Developments in Planning Professional Program as it may help prepare them for the examination.
5. If the Candidate is not successful in passing the examination they will be required to rewrite the examination at a future date.
6. If the Candidate is successful in passing the examination they will be notified that they are eligible to complete an Application for Professional Membership.
7. The Candidate will submit their Application for Professional Membership and include: proof of professional membership in good standing with AICP or RTPI; a the Record of Practical Work Experience with a minimum of one year of responsible Canadian planning experience; signed agreement to abide by the standards of ethical conduct and CPL requirements; and the signatures of three sponsors.
8. Completed applications will be submitted for consideration and approval.

Professional Certification Route for Those with an International Planning Degree or Related Degree with or without Canadian Experience (Special Arrangement #3)

1. Complete the application to become a Candidate member and attach proof of your degree and transcripts of courses and arrange for a designated verification organization to provide a verification certificate to determine advanced standing in the Professional Program.
2. If the Candidate has not successfully completed all the required courses and has more than seven years of responsible planning experience they have the option to try to obtain advanced standing using the PLAR (Portfolio) route. Depending on the quality of their Portfolio in relation to the National Competency Standards, advanced standing may exempt them from some or all required courses other than Developments in Planning Professional Program course.
3. If the Candidate has not successfully completed all the required courses they will be advised and the additional courses noted.
4. If the Candidate has successfully achieved advanced standing in all the required courses or an equivalent approved Portfolio, they will be eligible to enroll in the Developments in Planning Professional Program course.
5. If the Candidate is not successful in completing this course they will be required to retake the course until they are successful.
6. If the Candidate is successful in completing this course they will be eligible to challenge the professional exam.
7. The Candidate will apply to write the professional examination.
8. If the Candidate is not successful in passing the examination they will be required to rewrite the examination at a future date.
9. If the Candidate is successful in passing the examination they will be notified that they are eligible to complete an Application for Professional Membership.
10. The Candidate will submit their Application for Professional Membership and include: a Record of Practical Work Experience with a minimum of three years of responsible Canadian planning experience; signed agreement to abide by the standards of ethical conduct and CPL requirements; and the signatures of three sponsors.
11. Completed applications will be submitted for consideration and approval.