

Planning for the Future Project Update: Upgrading Membership Standards – What it Means to Become a Professional Planner in Canada

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The March 2010 edition of Planning West featured an article on the Planning for the Future Project – a project that recommends changes to the membership certification process in a very fundamental way – and one that could shape the future of the profession for years to come.

What is a professional planner? Who decides and how? What does it take to become one? As we reported in the previous article, these are some of the questions that the CIP led Planning for the Future Project team members have been wrestling with for the past few years. This substantial project reaches to the core of what planners do – and seeks to ensure that excellence in planning for the public good is achieved in a responsible, competent, and ethical way.

As this important project nears completion, we thought it would be timely to update members on for the status of the Planning for the Future Project, and what to expect in the next few months. This includes upcoming membership votes on bylaw amendments at both the national (CIP) and provincial / regional (PIBC) levels, followed by a transition period to implement and assess the new membership standards and processes.

These proposals for far-reaching changes to the standards and membership processes of the planning profession in Canada are nearly finalized, and will be enabled by key bylaw amendments that will be up for member consideration and adoption in the spring of 2011. The proposed changes will address how planning education is structured and recognized, identify standards of practice and ethics for professional planners, and establish new standards, processes and administrative structures for how the Institute certifies individuals as professional Members.

These important changes will be amongst the most fundamental changes to affect membership and professional standards in the history of the Canadian planning profession. It signals that the profession is responding to the changing demands and high quality standards that are expected of the profession in the 21st century.

What is the Planning for the Future Project?

In 2006, our national association – the Canadian Institute of Planners (CIP) – began a major project to re-examine, update, renew, and improve professional membership standards and processes in Canada. The project was initially called the Membership Continuous Improvement Project (MCIP) and later renamed the Planning for the Future (PFF) project. CIP's National Membership Standards Committee (NMSC) –formerly the National-Affiliate Membership Committee (NAMC) – has led the project, aided by a consultant, and with the assistance and input of many volunteer members from across Canada.

Why was this Project Undertaken?

At the commencement of the PFF project, it was strongly believed that, as a profession, planning needed to address contemporary trends and expectations with respect to professional standards and processes. The project was also responding to the fact that many of the Institute's membership certification standards and processes had not been

substantially revised in many years. These contemporary trends and expectations are represented by a variety of factors, including greater awareness and concern about the public interest, greater expectations of accountability, trends and precedents in other professions, labour mobility both within Canada and across international boundaries, and new, emerging skill and competency expectations within planning theory and practice.

Essentially, the project was to answer some of the following key questions:

- *What basic knowledge, skills and abilities should a professional planner be expected to have in Canada today?*
- *What basic ethical and professional standards should the planning profession have and how should they be upheld?*
- *What requirements and steps should the Institute adopt to certify a practitioner as a professional planner and Member?*
- *What requirements and steps should the Institute adopt to accredit a university degree program as a professional planning program in Canada?*
- *What other membership issues, policies, and processes should be updated in the current context of the planning profession?*

How Has the Project Unfolded?

It was recognized very early that given the scale of issues and potential changes, that a comprehensive and integrated approach which looked at the majority of the issues, standards, policies and processes within one large project was preferred over a segmented approach over time. In 2006, the external consultant – Jim Pealow of Association Management Consulting & Evaluation Services (AMCES) – was hired by CIP and began the process of shepherding the project forward by working with the NMSC (formerly the NAMC) and other stakeholders.

The first step was the development and publication of the first major report and discussion paper – *New Horizons for the Profession* – issued in May 2006. This report, drafted by the consultant, synthesized some of the initial consultation, identified the many issues and elements for consideration, and outlined a framework for the project to move forward. At the time, the first key issues identified for review included:

- **Competency Standards:** The high-level skills, knowledge, and abilities that a professional planner should hold.
- **Ethical Standards:** The professional standards of conduct and practice a professional planner should abide by.
- **Certification Standards:** The criteria and processes established and applied to administer how an individual becomes a professional planner and Full Member of the Institute.
- **Accreditation Standards:** The minimum requirements and core knowledge that a professionally accredited university planning degree program must provide.

Other related issues that were identified to be addressed as the project moved forward included: examining the Fellows membership category, examining reciprocity for non-resident planners or applicants, the impact of provincial legislation, and implementation issues.

Following the *New Horizons* report, and related consultation and feedback, a series of five different Task Forces made up of Members representing each of the affiliates from across the country was established. Task Force reports were prepared under the guidance of the

NMSC (NAMC) and rolled out over the subsequent three years to tackle the key issue areas, and develop specific proposals for change.

What has been PIBC's Participation & Feedback?

From the beginning of the project, a number of leading members from PIBC participated in each of the five Task Forces, contributing to the formative work that led to the recommended changes. Members across Canada, including PIBC members, also contributed comments directly to the project – particularly by identifying core competencies to assist the work of the Competency Task Force in its early research.

PIBC Council has been actively monitoring the ongoing progress of the project, and providing direct input and feedback to the NMSC (NAMC) and CIP at strategic points in the process. In September 2010, after an extensive process and many years of work, PIBC Council endorsed the final Planning for the Future Project proposals and recommendations.

In addition, the project proposals and recommendations have been endorsed by the National Membership Standards Committee (NMSC), CIP Council, and all other provincial/regional Affiliates across Canada (except Quebec which is in a unique regulatory situation).

What Are the Results?

By the fall of 2010, the work of all of the principal Task Forces had been completed, and a comprehensive set of recommended changes had been produced, which have been subsequently circulated and endorsed as noted earlier. Key elements include:

- A revised set of core competency standards for the planning profession, including knowledge-based 'functional' competencies and skill-based 'enabling' competencies.
- A revised set of ethical and professional practice standards, including updated Codes of Ethics, and Professional Conduct, and updated guidelines for the administration of the Codes.
- A revised set of certification standards that outline the requirements and steps to achieve membership as a professional planner in the Institute based on the new competency and ethical & professional standards.
- A revised set of accreditation standards and requirements for the professional accreditation of university planning degree programs.
- A revised and clarified process for the Fellows honorary designation.

What Exactly will the New Membership Certification Process Look Like?

The new membership certification standards and process will result in a number of changes, including the following:

- The category of membership now known as Provisional will be changed to *Candidate Membership*.
- The category of membership now known as Full will be changed to *Registered Membership*, and the associated professional designation will be *Registered Professional Planner*.
- There will be two principal entry routes to achieve Registered Membership as a Registered Professional Planner:
 - The first route will be for those individuals who are employed in planning and hold an accredited planning degree. This will be the preferred route to professional membership and will enable quick entry into the Candidate membership category for graduates with an accredited degree.
 - The second route will be for those individuals who are employed in planning and hold a degree that is not in planning or that is non-accredited. This route

will require an extensive review and evaluation of each individual's education and planning work experience (known as Prior Learning Assessment & Recognition, or PLAR). These will be based on the new competency standards, to determine eligibility for acceptance into the Candidate membership category.

- There will be a third route available for individuals who already hold professional membership in a foreign professional planning organization with which CIP has a formal reciprocal agreement (such as the AICP in the US, the RTPI in the UK, & the PIA in Australia).
- The revised standards will require Candidate Members with an accredited planning degree to complete and document a minimum of two years of professional planning experience to be considered for Registered Membership.
- Applicants with another degree will be required to cumulatively achieve and document a minimum of six years of professional planning experience.
- All Candidate Members will be required to:
 - participate in and complete a mandatory one-year mentoring program with a qualified Registered (Full) Member mentor.
 - successfully complete a mandatory course and exam on ethics and professionalism.
- A new national body (Professional Standards Board) – established through an administrative partnership between CIP and the provincial / regional Affiliates will maintain and administer key elements of the certification and accreditation processes. This will provide consistency in certification processes, and portability of membership across the country, while also improving administrative efficiencies and economies of scale in service delivery.

*Appended to the end of this article is a diagram that visually represents the proposed routes from applicant to Registered Membership as a Registered Professional Planner.

Who Will Be Affected by the New Standards & Certification Requirements?

When the proposed new standards and processes are enabled and adopted:

- All members will be affected and required to conduct themselves in accordance with the new ethical and professional practice standards ensured through the Institute's new Code of Ethics, and Codes of Professional Conduct. The ongoing expectation that professional planners contribute to the profession through a range of activities in their regional and national Institutes that includes honouring continuing professional development commitments remains a central responsibility of members. Within the new membership process, the mentoring of Candidate Members becomes an even more important shared responsibility of all professional planners.
- New membership terminology will apply, meaning that existing Provisional Members will become known as *Candidate Members*, and existing Full Members will become known as *Registered Members*. The Fellow designation will remain essentially unchanged. However it will be an honorific designation instead of a separate membership category. Student Members and those in the Associate category will be unaffected.
- The new membership certification standards and requirements will *only apply to future new applicants* who apply for membership as Candidate Members. The professional status of existing Full (or Registered) Members and Fellows will be unaffected.

- Existing Provisional (or Candidate) Members will be able to continue through the membership process to professional membership based on the process and requirements that were already in effect at the time they joined, *or* switch over to the new process if they wish. As before, time limits will apply for previous Provisional Members to complete the process to professional membership.
- Although the Fellow designation is being clarified as honorific, *existing Fellows* of the Institute will not be affected by these changes. Any adjustments to selection criteria and processes will be part of a separate process led by the College of Fellows.
- The new standards and requirements for the accreditation of university planning degree programs will affect both *existing recognized planning programs*, and *programs that apply* to become accredited in the future. There will be an extended transition period of up to nine years to enable existing recognized university planning degree programs to adjust to the new requirements, as may be required.

Are There Any Outstanding Issues?

The project's Administrative Task Force is still working on many administrative details related to having the appropriate information, materials, and logistics in place to implement the new standards and processes. This work will continue into 2011.

In addition, CIP is continuing to consult with the Association of Canadian University Planning Programs (ACUPP) to discuss some outstanding issues related to the new standards and requirements for the accreditation of university planning degree programs. Planning education is an integral part of certification standards and it is recognized that practitioners and the academic community need to work together to introduce and implement any new standards.

Once the new standards and processes are in place, there will be work undertaken to further explore the issues regarding provincial legislation and regulation of the planning profession across Canada. This work will get underway following the implementation of the new standards and processes in 2011.

What's Next?

As noted earlier, these new membership requirements have been endorsed both at the national (CIP) level and by the provincial / regional Affiliates – including PIBC. The next step will be to hold a national vote to amend relevant parts of the CIP bylaws to enable the implementation of the new standards and processes.

The CIP vote is expected to take place in the spring of 2011, followed by amendments to Affiliate bylaws shortly after. The purpose of the two-staged bylaw amendment approach is to ensure consistency across Canada at both the national and provincial / regional Affiliate levels.

Once the bylaw amendment process has been successfully completed, the remaining policy updates, new administrative structures and procedures will be put in place to enable the full implementation of the changes – likely in mid 2011.

What Aspects of the Proposals Will Be Voted On?

The new standards and processes represent a combination of many updates and improvements. Some basic changes to Institute bylaws are required, as well as the many more detailed updates to Institute policies and administrative procedures that will follow.

Therefore, although the project involves many different detailed changes, only a limited number of basic, key changes will be voted on as part of the bylaw amendment process.

These basic bylaw changes then enable the implementation of the other policy and process changes.

What Future Monitoring, Changes or Improvements will Take Place?

Although much time, effort and consideration has gone into the proposed new requirements and associated administrative procedures, no system is perfect. Once the new standards and processes are in place, the Institute – through the National Membership Standards Committee – will carefully monitor and evaluate their success, identify any problems or challenges, and oversee any adjustments or improvements that may be required going forward.

In addition, as part of the new policies, a re-examination of the standards on a regular basis is essential to ensure that they are succeeding in meeting the needs of the profession now and into the future.

Where Can Members Find More Information?

More information about the Planning for the Future Project, including copies of the detailed reports of the project Task Forces, can be found on the project website at:

www.planningincanada.ca

Thank You!

The intent of this article is to provide members with a useful, updated primer on the coming changes affecting membership standards. The revamping of membership standards and processes has involved the devotion of many personal hours and intensive work and contributions by Institute staff, volunteer members who have worked on the various Task Forces, members of Council, key stakeholders, and members at large. This commitment was mirrored across the country. As the project nears completion, there is still work ahead in completing the bylaw amendment process and ultimately the implementation and administration of the new standards.

We hope that all Members will take the time to learn more about the proposed changes and contact CIP and the PIBC Office with any questions or comments. Be sure to take the time to not only learn more, but also participate and vote on the upcoming bylaw amendments in 2011 to help us move our profession forward into the future.

Learn more online at: **www.planningincanada.ca**

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Planning for the Future: Routes to Registered Membership

