

## **Scope of Work – Strategic Assessment of Professional Governance for the Planning Profession in British Columbia (Last Updated April 15, 2025)**

### **1. Introduction**

The Planning Institute of British Columbia (PIBC) seeks to engage a qualified consulting team to prepare a strategic assessment of professional governance for the planning profession in British Columbia. This work is a key component of the [Professional Governance Research and Engagement Project](#) (the Project).

### **2. About PIBC**

PIBC is the professional association of planners in British Columbia and Yukon and has been dedicated to the advancement of the planning profession for more than 60 years. PIBC is the westernmost provincial/regional planning institute aligned with the Canadian Institute of Planners (CIP) – the national association for the profession – and was incorporated in 1958 under the *Society Act* of British Columbia. Today, PIBC has nearly 2,000 members and operates with 11 Board members, 7 staff or appointed positions, and 11 committees.

For more information about PIBC, please visit <https://www.pibc.bc.ca/about-pibc> and review the [2023-2025 Strategic Priorities](#) and [2023 PIBC Annual Report](#).

### **3. Context for Proposal**

Professional governance, or how a profession and its professionals are regulated, is a longstanding topic of interest of PIBC. Following enactment of the *Professional Governance Act* (PGA) by the government of British Columbia in 2018, several professions were required to transition to the new provincial regulatory framework. There is no pending requirement of the Province of British Columbia, nor has PIBC decided to voluntarily apply, to become regulated under the Professional Governance Act. But given the changing context of professional governance in British Columbia, ongoing interest within the planning profession, and the evolving regulation of planners elsewhere in Canada, the PIBC Board has identified this matter as a strategic priority for engagement with the membership and other stakeholders

In December 2023, the PIBC Board approved direction to undertake outreach and education about the PGA and possible opportunities and implications for PIBC and the planning profession. In 2024, the RPP Regulation Subcommittee of the Institute's Policy & Public Affairs Committee was assigned to provide guidance for the work of engaging the membership about professional governance and the PGA.

Through intense discussions about the need to collect as much information as possible and to make the information available to PIBC members, the Subcommittee crafted an integrated research and engagement work plan. At its meeting in November 2024, the PIBC Board endorsed the [Phase 1 Work Plan](#). For a summary of the progress of the Project, please see the [Q1 2025 Chair's Update](#). The [Fall 2024](#) issue of *Planning West* (the Institute's quarterly professional publication) included a high-level introduction to the Project. PIBC has also prepared an FAQ document that can be downloaded from the project [webpage](#).

#### **4. Goal and Objectives**

##### Goal

The goal of the proposed work is to add to the growing body of knowledge about professional governance that will empower PIBC members and the PIBC Board to have informed discussions and deliberations.

##### Objectives

In service of the goal, the objectives are to:

- Produce a structured set of analysis and information about professional governance options for the planning profession in British Columbia; and,
- Engage members and other stakeholders in a series of focus group sessions to probe current sentiments and perspectives on strategic matters relating to professional governance and the PGA, and to encourage cross-learning of diverse perspectives.

#### **5. Scope of Work**

At the outset of the contract, the Proponent is expected to meet with the Subcommittee and PIBC staff to confirm the detailed scope of work. There are two major components to the work – the overall strategic assessment and focus group sessions.

##### Strategic Assessment of Professional Governance Options

The strategic assessment will evaluate alternative professional governance options for their benefits, costs, and risks to the regulator, registrants, employers, and public interest. The assessment will involve both quantitative and qualitative analysis of the following:

- Operations (i.e. staffing, operational functions, reporting requirements, registrant retention and growth, revenues, expenditures, etc.)
- Registrants (i.e. registrant fees, planning firms, planners in Yukon, and labour mobility for planners between provinces and territories)
- Employers (i.e. local governments, planning firms, sole proprietors)
- Types and methods of advocacy that can be undertaken by the regulator and registrants
- Justice, equity, diversity, inclusion, reconciliation, and decolonization considerations

The professional governance options include, but are not limited to, the following:

- Status Quo (remaining as a voluntary, self-regulating member-based professional organization)
- PIBC transitions to become a professional regulator under the PGA
- New regulator for the planning profession is established under PGA
- Existing regulator under the PGA (e.g. EGBC, AIBC, etc.) takes on the role of regulating the planning profession

In addition, the strategic assessment will include the analysis of the opportunities and constraints to establishing a new organization, governed and operated independently from the professional regulator, to provide services that cannot be provided by a PGA regulator (e.g. member services and advocacy functions for professional planners in British Columbia).

As part of the data collection effort, key informant interviews may be conducted. PIBC has conducted a first round of key informant interviews with the six professional regulators under the PGA and several provincial and territorial professional planning institutes and associations elsewhere in Canada. The staff report documenting these initial interviews will be shared with the successful Proponent at project start-up. Where appropriate, additional key informant interviews may be undertaken to obtain specific information in support of the overall strategic assessment. These key informants will be confirmed in collaboration between the Proponent and PIBC.

Lastly, it must be emphasized that the final output of the strategic assessment is not a business case. While the strategic assessment will include quantitative analysis and strive to use evidence-informed assumptions, the work is intended to be a high-level analysis for the purposes of supporting informed discussions amongst members and the PIBC Board. Where appropriate, the Proponent should document key assumptions and the sources, and the level of certainty/uncertainty in the analysis, and identify specific areas that may warrant deeper analysis (e.g. equity impacts on underrepresented practitioners) – this information will help to inform potential future research and engagement.

### Focus Groups

The focus groups are intended to support the overall preparation of the strategic assessment. Focus groups enable a deeper engagement into the issues associated with professional governance and the planning profession. Focus groups enable cross-learning and exposure to other perspectives. Focus groups may reveal divergent perspectives or emerging consensus on specific issues, and raise key questions for further research and engagement. The Proponent should strive to achieve a diversity of participants with varied demographics, professional careers stages, and lived experiences. The number of focus group sessions will be determined in collaboration between the Proponent and PIBC.

Through the early research and engagement conducted by PIBC, several initial strategic questions have emerged. The focus group discussion topics may include the following strategic questions – the final topics will be confirmed in collaboration between the Proponent and PIBC:

- Is there a real risk – and what level is this risk – to the public interest from the practice of planning that only a regulator with statutory authority under the PGA can address?
- What does a definition of reserved practice look like given the diverse areas of practice of planners and potential intersections with other regulated professions?
- Do the benefits of obtaining reserved practice outweigh the changes to the role and responsibilities of PIBC?
- What are the impacts to registrants and employers should registrant fees have to increase to cover higher expenditures of PIBC as the regulator?

Through PIBC's first engagement survey, over 100 respondents provided their contact information to potentially participate in a focus group. It is anticipated that PIBC can support the recruitment of focus group participants. The priority attributes for the focus group participants will be confirmed in collaboration between the Proponent and PIBC, and may include:

- Region of work in British Columbia and Yukon (e.g. PIBC Chapter regions)
- PIBC membership status (e.g. Certified (RPP), Candidate, Retired, etc.)
- Career stage (e.g. student, junior planner, senior planner, manager, etc.)
- Sector (e.g. public, for-profit, non-profit, academia, etc.)
- Identity and lived experience (e.g. gender, ethnicity, disability, etc.)
- Indigenous practitioners and planning students
- Active and/or former registrants of other PGA regulators
- Major employers of planners

## 6. Supporting Resources

To inform the work, the successful Proponent will be provided access to the following resources.

### Engagement Survey

One of the early actions identified in the work plan was an [engagement survey](#), which was carried out between December 4, 2024 and February 5, 2025. The intention was to gain an understanding of where the membership was in terms of awareness about the PGA, preferred ways of engaging the process, and perspectives about how the profession is regulated in BC. The survey garnered over 300 responses and confirmed a high level of interest for more information about professional governance considerations.

### Initial Round of Key Informant Interviews

As noted above, PIBC conducted a first round of key informant interviews with the six professional regulators under the PGA and several out-of-province Provincial and Territorial Institutes and Associations.

### Initial Internal Legal Analysis

PIBC completed an internal legal analysis of the PGA in 2023. The analysis provides an overview of the PGA and highlights some of the issues and considerations that may pertain to PIBC and the planning profession in British Columbia.

## 7. Budget

The budget for the proposed contract is generally \$50,000 +/- a range subject to a final scope of work as agreed upon between PIBC and the successful Proponent.

## 8. Deliverables

The Proponent is expected to meet and coordinate with PIBC staff on an agreed-to regular basis for the purposes of project management. The Proponent is expected to engage with the RPP Regulation Subcommittee at project start-up and at pre-determined milestones to present draft and final findings. The Proponent may also be requested to present the final findings to the PIBC Board, other key internal audiences, and one webinar open to members.

- Strategic Assessment of Professional Governance Options:
  - Detailed report and PowerPoint containing methodology, analysis, key findings, and other strategic considerations
- Focus Groups:
  - Facilitated focus group sessions
  - PowerPoint of the methodology, key findings, and other strategic considerations

## 9. Schedule

The contract is anticipated to be substantively completed within five months of project initiation. For example, if the consultant onboarding takes place in June, then the project should be completed by November. A detailed scope of work and schedule will be prepared in collaboration with PIBC and be finalized generally within several weeks of onboarding.

## 10. Proponent Qualifications

The Proponent team should have proven experience undertaking governance analysis in the public sector and/or non-profit sector, knowledge and understanding of the *Professional Governance Act*, and designing and delivering focus groups on topics related to public policy and/or governance.

## 11. Submission Requirements

Interested Proponent teams must submit the following materials by **4:00PM PST, May 16, 2025 to Raymond Kan at [Raymond.Kan@pibc.bc.ca](mailto:Raymond.Kan@pibc.bc.ca)**.

- A cover letter expressing interest and understanding of the project, qualifications, and experience
- A proposal (not to exceed 12 pages, excluding key personnel resumes) comprising:
  - **Team description:** overview of team members, including qualifications and experience
  - **Team expertise and experience:** detailed summation of the team's expertise and experience in governance analysis in the public sector and/or non-profit sector.
  - **Project management structure:** critical for efficient and effective workflows and engagement with the client.
  - **Personnel Qualifications:** provide the key personnel, their roles, and their time allocation; for each personnel, include a resume in the appendix.
  - **Proposed project work plan:** include approach, methodology, tasks, deliverables, timelines, and time allocation of personnel; identify and describe any proposed deviations from the scope of work specified in this document.
  - **Proposed project budget and allocation:** separated by task
  - **Other information:** Any other information you consider relevant to the work.

## 12. Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- **Qualifications and experience (45%)**
  - Qualifications of the team to undertake the project based on expertise, past project experience, and assembled personnel
  - Appropriate allocation of personnel to specific tasks
- **Approach and Methodology (35%):**
  - Demonstrated understanding of the project
  - Clear articulation of the approach, methodology, schedule, and project management structure
  - Value-add or innovative offerings
- **Price (15%):**
  - The Proponent offering the lowest price will be awarded 15 points
  - Other Proponents' scores = 15 x (Lowest Price/Proponent Price)
- **References (5%):**
  - Previous client or employer feedback

The evaluation process noted above will determine the prominent submission(s) with the highest point score(s). PIBC may deem the Proponent with the highest point score to be the successful Proponent, or PIBC may conduct an interview with a minimum of two Proponents with the highest point scores.

Should PIBC choose to conduct interviews, the results and impressions from the interviews will be combined with the total point scores to determine which Proponent is deemed to be the successful Proponent.

PIBC will select, at its sole discretion, the Proponent that it determines is best suited to achieve the objectives for this work. Based on its evaluation and determination, PIBC reserves the right to, at its sole discretion, decline to proceed with any Proponent or submission received.

Completed proposals must be submitted by **4:00PM PST, May 16, 2025** to **Raymond Kan** at [Raymond.Kan@pibc.bc.ca](mailto:Raymond.Kan@pibc.bc.ca).