

PSB

For the Planning
Profession in Canada

PROFESSIONAL STANDARDS BOARD



Professional Standards Board Process for Certification in the Planning Profession

June 2016

Overview of PSB

- Part of CIP's *Planning for the Future* Project (PFF – 2006)
- Aimed at achieving consistent standards for certification of new planners and accreditation of university planning degree programs
- Supports Provincial and Territorial Institutes and Associations (PTIAs) working towards “right to practice” legislation
- A separate legal entity, incorporated September 10, 2012
- Candidate intake begun September 2012
- First Professional Examination sitting March 2013

ADMISSION TO PSB'S PROCESS

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Overview of PSB Admission Process

- PSB is a “one-stop shopping” entry point to certification and CIP/PTIA membership
- Potential Candidate members apply to PSB for admission to the certification processes through 3 entry routes:
 1. Accredited Degree (recognized by CIP and Provincial/Territorial Institutes or Associations (PTIAs))
 2. Reciprocal Agreement (with APA/AICP, PIA or RTPI)
 3. Prior Learning Assessment Recognition (PLAR)

Common Entry Prerequisites

- To enter via any route, Candidates must be currently employed in planning:
 - “The scientific, aesthetic and orderly disposition of land, resources, facilities and services with a view to securing the physical, economic and social efficiency, health and well-being of urban and rural communities”
- Candidates must hold a degree
- Individual entry routes have additional requirements

Entry via Accredited Degree

- Applicants for this route must hold a degree from a university planning program:
 - currently or formerly accredited by PSB or
 - recognized by CIP prior to PSB's incorporation
- The degree must have been earned while the program was accredited/recognized
- Note: PAB (US) and PIA (Australia) accredited programs are also accepted as accredited by PSB

Entry via Reciprocal Agreement

- Applicants must be full (certified) members of an international planning institute with which CIP has a reciprocal agreement:
 - APA/AICP (US)
 - RTPI (UK)
 - PIA (Australia)

Entry via PLAR

- Allows entry for applicants with:
 - A Canadian planning degree that is not accredited
 - A Canadian degree in a field other than planning
 - A non-Canadian degree in any field, including planning
- PLAR applicants must also have 5 years' responsible professional planning experience
- PLAR applicants must submit a portfolio for evaluation
 - Complete a self-assessment grid against the competencies
 - Provide evidence, via the portfolio, to substantiate the self-assessment

Certification Requirements

- All Candidate members must complete:
 - Mentorship - 1 year minimum, supervised by Mentor
 - Sponsorship – (1 year minimum for PLAR and Reciprocal Agreement Candidates; 2 years minimum for Accredited Degree Candidates) attested by Sponsor
 - **Mentorship/Sponsorship is not complete until the Mentor/Sponsor is satisfied**
 - Ethics & Professionalism course and test
 - Professional examination (written)
 - **Candidate cannot take Professional examination until all other steps are completed**
 - Candidate must be a Candidate member of CIP/PTIA throughout the process
 - Candidate has 7 years to complete the process

SPONSORSHIP



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Who Can Be a Sponsor?

- A Registered/Certified member in good standing of CIP and a PTIA (RPP, LPP, MCIP)
- More than 3 years' experience as a Registered/Certified member
- **Must be at arms-length from the Candidate** – not a direct supervisor, subordinate, close work colleague or in any personal or business conflict of interest
- Must review Sponsor's training materials

Work Experience

- Work experience must be “**responsible** professional planning” experience:
 - Comprises 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 deposition of land or the allocation of resources, facilities or services;
 - Shows a specific relationship to public policies or programs for controlling or influencing the development of communities
 - Comprises a substantive component of initiative, judgment, substantial involvement and personal accountability or definition or preparation of significant elements of the program of work
 - Relates to the professional competencies

It does **not** include technical, clerical or administrative work performed in support of the planning function.

The Candidate's Acquisition of Experience

Candidates normally acquire their responsible professional planning experience after they have been enrolled in PSB's processes. *However:*

- **Subject to Sponsor's agreement**, a Candidate who has applied through the Accredited Degree route may log experience gained between the completion of that degree and his/her application to PSB

It may well take longer than 2 years (1 year for PLAR and Reciprocal Agreement Candidates) to accumulate the requisite amount of responsible professional experience; for instance, a Candidate who only does responsible professional planning work during half of his/her day-to-day work will take twice as long as the minimum time specified

Responsible professional planning experience must be gained as part of **paid** employment in planning – volunteer work or work done as part of a co-op placement for academic credit is not acceptable.

Backlogging Work Experience

- Accredited Degree applicants may be allowed to use experience gained prior to application, provided:
 - Their Sponsors agree
 - The experience was gained post-degree
 - The applicant was paid for the work
- This accommodation is **not** available to PLAR or Reciprocal Agreement applicants

What is a Sponsor's Role?

- Objective third-party
- **Key part of the profession's quality assurance process**
- Reviews, verifies and validates the Candidate member's *Record of Practical Work Experience*, which records his/her **responsible professional planning experience**
- Ensures that all requirements for practical work experience have been met:
 - Work was performed as indicated, and accurately documented and consistent with professional competencies
 - Work constitutes acceptable **responsible** professional planning experience
- Provides guidance to the Candidate (if necessary) after reviewing the *Record of Practical Work Experience*

What Are a Sponsor's Responsibilities?

- Read the Sponsors' Guide in the "For Volunteers | Sponsors" section of the PSB website, and contact the office with any questions
- Sign the Sponsorship Agreement
- Ideally, request the Candidate to submit the *Record of Practical Work Experience* semi-annually; this will save the Sponsor the work of reviewing several years' experience at the end of the logging period and provide more immediate feedback to the Candidate
- Satisfy him/herself that the Candidate has made sufficient progress against the professional competencies to qualify as a Certified member
- Review the *Record of Practical Work Experience* the Candidate prepares and, if satisfied that it **meets the criteria for responsibility** and Sponsor has verified the work, sign off on it and return it to the Candidate

Record of Practical Work Experience

When a Candidate feels s/he has completed the minimum period of responsible professional planning work, s/he will submit a *Record of Practical Work Experience* to the Sponsor to review, verify and validate:

- Review: in the Sponsor's judgment, does the experience meet the criteria for *responsible* planning experience, and does it represent at least the minimum amount of such experience?
- Verify: ascertain, through discussion with the Candidate and his/her supervisor(s), whether the work was performed as indicated, was accurately documented, and consistent with the professional competencies
- Validate: if the Sponsor is satisfied that the work meets the criteria and has verified it, s/he should validate the *Record* by signing off on it. If s/he is not satisfied, s/he should explain his/her concerns to the Candidate, identify what action s/he needs to take, and return the unsigned *Record*

PSB encourages the record to be submitted more frequently than semi-annually. Sponsor may reject a *Record of Practical Work Experience* if s/he feels it does not illustrate *responsible* professional planning experience, is not verified, is incomplete, does not meet the minimum time period, etc.

What Should the *Record* Demonstrate?

The *Record* should demonstrate that the Candidate has:

- Acquired, utilized or demonstrated, through the experience, an acceptable level and range of the competencies
- Progressed in their level of personal professional responsibility over the period of employment recorded
- Demonstrated evidence of a broad range of planning experience as opposed to a narrowly restricted set of work experience(s)
- Generated original planning documentation and policy development

With regard to the level and range of competencies demonstrated, please bear in mind that the goal is versatility in competence; there is **no** expectation that an individual will cover **all** the competencies.

MENTORSHIP



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What Are the Requirements To Be a Mentor?

- A Registered/Certified member in good standing of CIP and a PTIA (RPP, LPP, MCIP)
- More than 3 years' experience as a Registered/Certified member
- **Ideally** a supervisor, close work colleague or other close professional colleague of the Candidate member
- Must review Mentor's training material

What Does a Mentor Do?

- Meets with Candidate member frequently (e.g., every 2 months) over the minimum one-year Mentorship period, either in person or electronically
- Ensures Candidate member is familiar with, integrates, and can apply:
 - The PTIA's Code of Ethics or equivalent.
 - The CIP Code of Professional Conduct.
 - The role of the 'public interest' in professional planning.
 - The role of the profession in maintaining standards of competency, ethics and professionalism.
 - A broad range of the profession's competencies
- Undertake various joint practice and professional development activities with the Candidate member
- Assist the Candidate member in personal and professional growth

What Are the Mentor's Responsibilities?

- Read the Mentors' Guide in the "For Volunteers | Mentors" section of the PSB website, and contact the office with any questions
- Sign the Mentorship Agreement
- Meet regularly with the Candidate over the one-year period of Mentorship and take notes of those meetings
- Satisfy him/herself that the Candidate has made sufficient progress against the personal and professional objectives of the mentorship to qualify as a Certified member
- Review the Record of Mentorship the Candidate prepares and, if satisfied that it supports Mentor's judgment of the Candidate's progress and accurately summarizes reported meetings/activities, sign off on it and return it to the Candidate

Record of Mentorship

The *Record of Mentorship* should show:

- The date of the meeting/activity
- The subjects discussed
- The follow-up action to be taken by the Candidate
- Comments by the Mentor
- Comments by the Candidate

Meetings/activities should **not** be related to the Candidate's normal work activities (a meeting to discuss progress on a specific project is not acceptable)

ETHICS & PROFESSIONALISM COURSE



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Ethics & Professionalism Course

- Consists of:
 - Professions and Professional Culture
 - Why Planning is Concerned About Practitioner Ethics
 - Professional Obligations and Responsibilities
 - The Ethical Planning Practitioner
 - The Public Interest
 - Professional Codes of Ethics and Practice
 - Sample Case Studies and Exercises
- Concluding test
- Candidates must achieve a score of 70% on the test

PROFESSIONAL EXAMINATION



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Professional Examination

- Candidates must have completed their Mentorship, Sponsorship and the Ethics & Professionalism course and test before attempting the Professional Examination
- Questions in 3 areas:
 - The Public Interest
 - Ethics
 - Professionalism
- Candidates must achieve a score of 80% on this Examination

Professional Examination

- September 2016 will mark the first sitting of the new multiple choice examination format
- Examines enabling competencies, not functional competencies
- Though no longer in long written format, the question bank has been designed to allow Candidates to use their thought processes and ability to integrate theory and past experience into future practice
- Exam will maintain its rigour and continue to require significant preparation

Professional Examination

- Question formats will vary, and will include some true/false, some weighted
- The new format will significantly reduce the delay between writing the exam and receiving mark
- Questions are currently being vetted by a number of professional planners
- More information will be posted to the PSB website as soon as possible, including sample questions

CERTIFICATION

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Certification

- Candidates who have successfully completed **all** the steps in the process will be recommended to their PTIA for admission as a full (certified) member of the Institute
- PSB does **not** grant certification – we only administer the process. Certification can only be granted by a PTIA

VOLUNTEER OPPORTUNITIES WITH PSB



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Volunteer Opportunities with PSB

- PSB is actively seeking volunteers for a variety of roles:
 - Mentors
 - Sponsors
 - Examiners
 - PLAR Assessors
 - Site Visit Team Members (university accreditation)
- PSB volunteers are eligible for CPL credits – please contact your PTIA for further information

PLAR Assessor's Responsibilities

- Review the self-assessment grid to determine:
 - Does the applicant have a reasonable balance of competencies?
 - Does the evidence supplied support the self-evaluation?
- Review the portfolio to determine:
 - Does the work experience match the self-assessment grid?
 - Is 5 years **responsible** professional planning experience evidenced in the grid and portfolio?
- Does the applicant meet the criteria for PSB and membership in a PTIA and/or CIP?

Assessors' Judgment

- Assessors should ask themselves:
 - Does this applicant have a combination of education and experience equal to or better than an applicant with an accredited degree?
 - Will this applicant's education/experience provide an adequate base to permit him/her to complete PSB's process and become certified?
 - Will this applicant, having gone through PSB's process and having achieved certification, be a credit to the profession, CIP and his/her PTIA?
- If the answer to the first question is "yes" and to the second and third is "probably", the applicant should be admitted

Site Visit Team Member's Responsibilities

- Be familiar with the accreditation standards and SVT Guide
- Review the university program's application to identify questions and concerns, strengths and weaknesses
- Participate in 1-2 SVT meetings before the accreditation visit
- Participate in the accreditation visit (about 3 days – meetings with faculty, students, alumni, area employers, PTIA)
- Help the SVT Chair draft the team's report and recommendation
- Review the university's response and finalize the report/recommendation

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