

Guide for Candidate Members & Sponsors

For Completing the PSB Record of Practical Work Experience & Sponsorship Requirements

1.0 Introduction:

All Candidate members of Provincial/Territorial Institutes or Associations (PTIAs) seeking eligibility for entry into full Registered (Certified) Membership as a Professional Planner are required to meet the practical work experience standards by obtaining and demonstrating a minimum number of years of responsible professional planning work experience gained in a planning environment, and under the guidance and review of a sponsor. In addition, they are required to demonstrate to the satisfaction of the sponsor that they are adequately prepared to write the PSB's Professional Examination. Therefore, the onus is on the Candidate Members to persuade their sponsor as to the adequacy of his/her exam preparation.

Successful completion of the practical work experience requirement is, along with completion of the Mentorship requirement and Ethics & Professionalism Course, required by all Candidate Members prior to any application to write the Professional Examination and ultimate admission to Registered (Certified) Membership.

This guide outlines the requirements and standards that Candidate Members are required to meet with respect to practical work experience, and provides guidelines for the recording and reporting of that experience. Candidate members should carefully review and familiarize themselves with this guide, and use it for reference as they obtain and record their practical work experience.

2.0 Practical Planning Work Experience & Sponsorship Requirements:

Before undertaking the process of obtaining, recording and demonstrating the required practical work experience it is important for Candidate members to understand the standards set by the profession. The current standards set the following requirements for the demonstration of responsible professional planning experience:

- Candidate members with a degree in planning from a Professional Standards Board (PSB) Accredited Planning Program must obtain and demonstrate the equivalent of **two years of responsible** professional planning experience gained in a planning environment.
- Candidate members with an approved Prior Learning Assessment Recognition (or PLAR) Portfolio must obtain and demonstrate the equivalent of **one additional year of responsible** professional planning experience gained in a planning environment. The one year experience is *in addition to* the minimum of five years of responsible professional planning experience obtained and previously demonstrated through the PLAR process.
- Candidate members with international professional membership credentials from a foreign professional planning organization formally recognized by the Institute must obtain and demonstrate the equivalent of **one year of responsible** professional planning experience gained in a planning environment.
- All Candidate members will complete a written **Record of Practical Work Experience** (available from the PSB website) demonstrating their practical work experience, and arrange for a Sponsor (a Registered (Certified) Member of the profession in good standing who has more than three years' experience as a Registered (Certified) Member) to review and sign the *Record of Practical Work Experience*, attesting that the practical work experience requirements have been met.

- All Candidate members will provide their Sponsor with a copy of this Guide prior to the completion and validation/signing of the *Record of Practical Work Experience*.

3.0 The Sponsor:

The role of the sponsor is to review and ultimately sign-off on, or validate, a Candidate member's practical work experience as having met the requirements set by the profession, prior to the final submission of that documented experience to PSB. The sponsor is also required to comment and sign off on the Candidate Member's preparedness to write the PSB's Professional Practice Examination.

The sponsor must be a Registered (Certified) Member of a PTIA in good standing who has more than three years' experience as a Registered (Certified) Member. The sponsor's role is somewhat at "arm's length" from the Candidate member, and therefore s/he must also be an individual who does not have any direct conflict of interest with the Candidate member, such as:

- Being a direct supervisor, subordinate or close work colleague of the Candidate member
- Being in any personal or business conflict of interest with the Candidate member

It is the responsibility of the Candidate member to identify and secure a sponsor. Only in exceptional circumstances, if a Candidate member is unable to successfully identify and secure a sponsor, will the local provincial/territorial institute or association provide assistance.

The sponsor must agree to the Candidate member's request to serve as his/her sponsor, and should be provided with this Guide upon agreeing to serve as a Sponsor. Sponsors should carefully review and familiarize themselves with this guide, and use it for reference as they undertake their role. (Information specifically for sponsors is provided in the next section of this guide).

4.0 Sponsor Guidelines:

The sponsor agrees to review and attest to (sign off on) a Candidate member's *Record of Practical Work Experience* and preparedness to write the PSB's Professional Examination. A sponsor's activities may also include offering feedback on whether a type of work constitutes *responsible* professional planning experience upon receiving the *Record of Practical Work Experience*. The sponsor's attestation and signature on the *Record of Practical Work Experience* does not merely indicate that they believe that the work was carried out, but *also* indicates that the sponsor is *fully satisfied* that the reported work constitutes acceptable responsible professional planning experience as described below (see section 5.0). As noted previously:

- The sponsor must be a full Registered (Certified) Member of a PTIA in good standing who has more than three years' of experience as a Registered (Certified) Member.
- The sponsor must be an individual who does not have any direct conflict of interest with the Candidate member.
- The sponsor's relationship with the Candidate member will normally last for the duration of the sponsor's review of the Candidate member's *Record of Practical Work Experience* and conclude when the Candidate member's *Record of Practical Work Experience* has been successfully validated and accepted by PSB.

The role of the sponsor is to be an objective "third-party" responsible for reviewing, verifying and validating the *Record of Practical Work Experience*, ensuring that all requirements for practical work

experience have been met, attesting to her/his preparedness to write the PSB's Professional Practice Examination, and for providing guidance to the Candidate member, if necessary, after reviewing their *Record of Practical Work Experience*.

The direct supervisor of the Candidate member is not required to sign off on the *Record of Practical Work Experience*, so the sponsor is ultimately responsible for verifying the work detailed in the *Record of Practical Work Experience* was truly performed as indicated and accurately documented and consistent with the professional competencies. The sponsor should not hesitate to ask the Candidate member for additional information, or follow up with the Candidate's supervisor if required, in order to be satisfied with the *Record of Practical Work Experience*.

As noted above, the sponsor's validation and signature in respect of the *Record of Practical Work Experience* does not merely indicate that they believe that the work was carried out, but *also* indicates that the Sponsor is *fully satisfied* that the reported work constitutes acceptable responsible professional planning experience.

As noted previously, the sponsor's role is that of an objective "third-party" with respect to reviewing and validating the *Record of Practical Work Experience*. It is also important to note that it is the role of the mentor to provide ongoing advice, guidance and assistance to the Candidate Member throughout their period of practical work experience, in conjunction with the one-year mentorship requirement. Candidate Members and Sponsors should also refer to the *Guide for Candidate Members and Mentors* for information about the mentorship requirements, the role of the mentor, and the way in which mentorship and sponsorship complement one another.

5.0 Defining Eligible Responsible Professional Planning Work Experience:

To meet the standards, practical work experience obtained and demonstrated must meet the profession's definition of "Responsible Professional Planning Experience" – meaning that it is not only work undertaken in a planning environment, but that it is also of a sufficient level of responsibility and is work that requires a sufficient level of professional competency. Therefore, not *all* work undertaken in a planning environment will necessarily be eligible with respect to meeting the requirements.

Candidate Members should carefully review and be aware of the profession's definition of Responsible Professional Planning Experience. Responsible Professional Planning Experience means work:

- 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 deposition of land or the allocation of resources, facilities or services;
- which shows a specific relationship to public policies or programs for controlling or influencing the development of communities;
- 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.

Technical, clerical or administrative work performed in support of the planning function shall not be considered responsible professional planning experience. Recognizing that many professional planners may be required to perform functions that lie outside of the definition of responsible professional planning experience, in some cases Candidate members may need to obtain the necessary practical

work experience over a longer period of time (beyond the minimum duration prescribed by the requirements).

6.0 Linking Practical Work Experience to the Profession’s Key Competencies:

An important element of the practical work experience requirement is for Candidate members to suitably show that their practical work experience reflects their acquisition, utilization or demonstration of the professional competencies. It should be noted that the Candidate member is not expected to demonstrate work experience in every competency area.

Candidate Members should carefully review and be aware of the profession’s professional competencies (functional competencies and enabling competencies). These competencies identify the capacities required of a professional planner to practice effectively, professionally and ethically. A detailed outline of the competencies is provided elsewhere in this guide (see Appendix 1); and a summary of the broad competency headings is provided here:

FUNCTIONAL COMPETENCIES:

Human Settlement
History & Principles of Community Planning
Government Law & Policy
Plan & Policy Considerations
Plan & Policy Making
Plan & Policy Implementation
Developments in Planning

ENABLING COMPETENCIES:

Critical Thinking
Interpersonal
Communication
Leadership
Professionalism & Ethical Behaviour

The form of the *Record of Practical Work Experience* establishes the framework for linking Candidate members’ practical work experience to the competencies. Candidate members should carefully consider the competencies when recording their practical work experience – bearing in mind the need to link the work experience to the competencies.

7.0 The Record of Practical Work Experience:

The *Record of Practical Work Experience* is the written documentation of a Candidate member’s responsible professional planning experience, and is ultimately reviewed and signed (validated) by the Sponsor before being submitted to PSB.

Candidate members compile their *Record of Practical Work Experience* by completing a Practical Work Experience Form (see the PSB website) for each planning position or role they have held or undertaken during the period for which they are reporting practical work experience. The *Record of Practical Work Experience* submission should include each completed and validated Practical Work Experience Form. Key pieces of information about Candidate members’ experience that must be included with each Practical Work Experience Form include:

- Position held or role undertaken, including the location and employer
- The total duration or period of employment being reported.
- Information on reporting relationship(s) – both supervisory and subordinate.
- Summary description of the various planning activities and functions performed as well as key projects and/or initiatives worked upon.
- Information on the degree of personal professional responsibility for the work undertaken.

- Indication of the duration of time (total months) for which responsible professional planning work was undertaken during the duration or period of employment being recorded.
- Indication of the functional and enabling competencies acquired, utilized or demonstrated during the period of employment being recorded.

In most cases, obtaining the minimum specified amount of practical work experience will take longer than the equivalent period worked in calendar years. For example, a planner who only undertakes responsible professional planning work during half of his/her day-to-day work in a particular position will take at least four calendar years of work in that position to achieve the equivalent of two years of eligible responsible professional planning experience.

The record of practical work experience should demonstrate that the Candidate member 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, policy development

8.0 Tips & Guidelines for Candidate Members:

When completing their *Record of Practical Work Experience* Candidate members should bear in mind the following tips and guidelines:

- Clearly describe the work involved, (research and analysis; policy formulation; design and layout; review of development proposals or policies; policy implementation, etc.) and how it represents and demonstrates *responsible professional planning experience* utilizing the language of the key competencies. Concise descriptions that show a grasp of the planning issues involved are what is being looked for.
- Clearly articulate in your description *your* degree of personal responsibility for each planning function, activity, project or initiative identified and ensure that over the period of employment recorded, *your Record of Practical Work Experience* reflects that you have progressed in your personal level of responsibility.
- If portions of your duties do not fall within the Institute’s definition of responsible, professional planning experience, you are responsible for documenting this clearly in your submission and for making adjustments in the duration of time (total months) for which responsible professional planning work was undertaken and is being claimed for during the duration or period of employment being recorded.
- Demonstrating an understanding of planning is the key, not the volume of duties or activities undertaken. A progressive breadth and depth of experience across a varied range of planning work is what is being looked for. A simple basic job description or bullet list of projects/tasks is not sufficient.
- You should also give evidence that you have generated original planning documentation, policy or work product, and that you have had the opportunity to experience different types of planning work.

Candidate members are encouraged to seek appropriate guidance and assistance from their Mentor when compiling their *Record of Practical Work Experience*.

9.0 Submission and Acceptance:

Candidate members submit the entire completed, validated and signed *Record of Practical Work Experience* upon full completion of the practical work experience requirement (not in partial form) to the PSB office at certification@psb-planningcanada.ca,

The following checklist should be used by Candidate members prior to the final submission of their completed *Record of Practical Work Experience*:

- Each Practical Work Experience Form completed with all required information, including position(s) held, employer information, employment duration, reporting relationships, planning work performed, key projects/initiatives, etc.
- Information linking experience to key competencies.
- Information on the duration of responsible professional planning work experience being reported.
- Validation and signature from Sponsor confirming that the Sponsor has reviewed, verified and signed off on the completed *Record of Practical Work Experience* where specified.
- Inclusion of payment for any applicable processing fee prescribed by PSB as may be required.

The *Record of Practical Work Experience* submitted will be reviewed and accepted by PSB. Completion of the *Record of Practical Work Experience* will be verified prior to the acceptance of a Candidate member's application to write the Professional Exam.

10.0 Rejection and Appeals:

In the event that a Candidate member's *Record of Practical Work Experience* is rejected by PSB as incomplete or insufficient with respect to meeting the requirement, the Candidate member will be given reasons for the rejection as well as feedback to assist them in successfully completing the requirement through a revised submission. If a Candidate is asked to resubmit a revised *Record of Practical Work Experience*, the revised record must also be reviewed and signed off by the Sponsor.

In any case of a rejection, the Candidate member shall have the right to appeal the acceptance of their *Record of Practical Work Experience* in writing, in accordance with the Appeals policies established by PSB. Candidate members should consult the Appeals policies of PSB for more information regarding such appeals.

11.0 More Information:

For more information, or any questions regarding the practical work experience and sponsorship requirements, please contact the PSB at certification@psb-planningcanada.ca.

APPENDIX 1 – Competencies:

A – FUNCTIONAL COMPETENCIES:

Human Settlement:

Human Settlement and Community, Regional and Provincial Settings:

- Understand knowledge of human settlement, its evolution and history, influence of natural setting and site context, geography, economy, environment and sustainability issues, changing forms and political and social structure.
- Able to identify lessons learned from past experiences.
- Able to link lessons learned in human settlement to current and future planning challenges and opportunities.

Influences on Communities:

- Understand local government and relation to provincial government, finance and land use, and the broad principles that guide the physical design of communities and the design and operation of infrastructure and services.
- Understand the role that transportation infrastructure plays in determining community structure.
- Understand the roles of economic development and social service provisions, including housing.
- Understand the elements of sustainable community building and ability to assess progress of initiatives.
- Able to relate the influences to planning activities.

History & Principles of Community Planning:

History of Planning in Canada and Other Countries:

- Understand the history of small and large-scale community planning. Understand the historical evolution of community planning as a function of government, as a professional activity, and as a reform movement.
- Understand how to use lessons learned to support future decision-making.

Planning Theories, Principles and Practices:

- Understand theories, ideals and principles which have guided small and large scale community planning and its physical expression
- Understand approaches to and methods of policy analysis and the role and methods of public consultation and involvement in decision-making
- Understanding of the concepts of community based development.
- Understand the strengths, limitations, and uncertainties associated with the political, social, environmental, cultural and economic nature of public interest and the roles of professional judgment, expertise and advice within these frameworks.

Governments, Law and Policy:

Governments and Legislation:

- Understand the political, legal and institutional contexts of the realm of planning practice.
- Understand how legislation and laws influence and requires planning.
- Understand the agency and employment relationship of planning to legislation.

Policies and Application:

- Understand and able to evaluate critically policy formulation, evaluation, and tools and strategies for implementation
- Understands policy application in specific planning contexts (resource management, health, environment, development etc.) and how the legal/legislative context affects planning
- Understand how planners support legislation, develop recommendations and advise on policies.
- Understand methods for implementing public policy and planning within the framework of Canadian law and the process of government (Includes planning law, community development processes and plans, zoning and other implementation techniques, urban design, governments systems, political and organizational behaviour, public finance principles, evaluation methods, impact assessment, and litigation).

Plan and Policy Considerations:

Environmental and Sustainable Development Issues:

- Understand environmental management, biophysical environments and systems, ecological limits and processes, and science and sustainability.
- Understand the relationship between ecological, social and economic factors in planning, including the concept of sustainable development.
- Able to assess issues and the effects on development actions and able to debate and link the relationships by using planning as a positive influence.

Diversity and Inclusiveness:

- Understand demographics of society and diversity and inclusiveness considerations including, but not limited to Aboriginal people.
- Understand practices to effectively comply with legal aspects and benefit from approaches to building on diversity and difference.
- Able to develop plans that build on diversity and inclusiveness considerations.

Functional Integration of Knowledge:

- Understand basic elements and interactions between the following functional areas and other areas that have a relationship to planning: transportation; facilities; economics; social; urban design; legal; resources; environment; recreation; housing; infrastructure; land use; development control; etc.
- Understand how to use networks and other domains of knowledge to support decision making
- Able to integrate knowledge and demonstrate technical capacities to apply it to planning situations.
- Able to understand how technology can support planning analysis and activities, policy development and decision making.

Finance and Economics:

- Understand the economics of development (private and public perspectives).
- Understand local government finance and its relationship to development.
- Able to assess financial and economic considerations, and use this information to support the development of planning proposals and reports.

Plan and Policy Making:

Planning Approaches and Focus:

- Understand the various approaches and instruments used in small and large scale plan making and policy development.
- Able to determine the challenge or opportunity to be addressed.
- Able to select an approach to and clarify the focus of the plan.

Developing Visions and Outcomes:

- Understand approaches to the development of visions and outcomes.
- Able to use analysis and processes to assess possible options.
- Able to develop visions and outcomes.
- Able to articulate, present, and defend visions, plans and policies.

Strategic Information Gathering and Analysis:

- Understand what information should be gathered.
- Able to gather information to enable a critical analysis of the situation.
- Able to analyze information gathered to support development of a proposal or plan.
- Understand how technology can gather input and analyze information.
- Able to apply technology to support analysis

Obtaining Input and Approvals:

- Understand practices to effectively engage and gather input from key stakeholders.
- Able to prepare reports and presentations to support input gathering.
- Able to present analysis and reports, support discussions and make recommendations leading to approval.

Plan and Policy Implementation:

Decision Making and Risk Management:

- Understand various modes of decision making and how the technical, financial, social, environmental and political factors are integrated into sound decision making.
- Understand risk management and its integration into sound decision making.
- Understand land use regulations, legal, environmental, infrastructure, finance and economics, development control, and other considerations that are part of implementation.
- Able to integrate information to minimize risk.

Implementation Plan:

- Understand practices to develop an effective implementation plan.
- Able to engage other key stakeholders in the development and review of the plan.
- Able to develop and support implementation of a plan.

Project Management:

- Understand basic practices of project management.
- Able to apply project management techniques and tools to support projects.
- Able to complete projects based on desired outcomes and targets.

Finance and Administration:

- Understand finance and administration practices to effectively manage project or plan implementation.
- Able to monitor and assess financial and administrative activities.
- Able to report on financial and administrative activities.

Evaluation:

- Understand practices to evaluate and monitor plan implementation.
- Able to frame recommendations for implementation which can be monitored and evaluated.
- Able to assess and determine when correction is required.
- Able to direct or use evaluation processes and develop reports.

Developments in Planning:

Emerging Trends and Issues:

- Understand practices to monitor emerging trends and issues that relate to planning.
- Able to source and critically assess external and internal environment information to support analysis of the topics.
- Able to critically assess applicability to plans, physical designs, projects and activities, and report on potential innovations and improvements.
- Support information exchange within the profession on trends and best practices.

B – ENABLING COMPETENCIES:

Critical Thinking:

Issues Identification:

- Understand effective issues identification practices to determine and manage issues.
- Able to identify and track emerging issues in light of project goals, resources and stakeholder interests.
- Able to facilitate processes to identify issues and seek input, categorize, analyze and report on issues.

Problem Solving and Decision Making:

- Understand effective problem-solving and decision making practices and underlying values and potential ethical issues.
- Able to define problems and identify viable options and possible solutions.
- Able to relate activities in one area to others and assess potential for the integration of ideas.
- Able to pull together diverse ideas, issues and observations into a simple, clear and useful analysis and/or presentation.
- Able to support complex decision making.

Research and Analytical:

- Understand methods and practices to find relevant information and conduct an analysis.
- Able to compare and integrate data from various sources and identify cause/effect relationships.
- Able to analyze results effectively.
- Able to evaluate results.

Innovation and Creativity:

- Understand and encourage practices to support innovation and creativity in work environments.
- Use innovation and creative practices and tools to facilitate decision making.

Political Awareness:

- Understand political motives, issues and actions.
- Actively follow political trends, issues and activities.
- Demonstrate awareness of how political trends, issues and activities influence decision making.

Change Management

- Understand stages within the change process and practices to implement change.
- Able to monitor issues and anticipate potential changes.
- Use change management processes to implement decisions.

Interpersonal:

Integrity and Trust:

- Understand the importance of maintaining high standards of integrity and trust.
- Able to provide a balanced picture, respect others and build trust.
- Able to set a positive example.

Diversity and Inclusiveness:

- Understand the elements of diversity and difference.
- Appreciate the value of diversity.
- Able to apply policy and practices to accommodate diversity and inclusiveness.
- Able to articulate recommendations for consideration and action.

Facilitation:

- Understand the value of facilitation to plan making and implementation.
- Understand practices to facilitate situations.
- Able to facilitate situations to support decision-making and engender commitment.

Negotiation:

- Understand practices to support negotiations.
- Able to support position and presents issues in a factual and persuasive manner.
- Able to build on common ground and seek compromise when appropriate.

Collaboration and Consensus Building:

- Understand practices to support collaboration and consensus building.
- Able to asses and analyze an approach to support improvements.
- Able to facilitate collaboration and consensus building situations.

Conflict Management:

- Understand practices to manage conflict.
- Able to assess the nature of a conflict and suggest an approach to address the conflict.
- Able to address conflicts in a non-judgmental fashion, clarify differences, and build on common interests.
- Able to propose recommendations for consideration and action.

Communications:

Listening:

- Demonstrate capacity to listen effectively and understand messages.
- Able to confirm messages have been received and are understood.

Written and Oral Presentation

- Understand practices and tools to support simple and effective written, oral and visual/graphic presentations.
- Able to express ideas in a clear, organized and effective manner, both verbally and non-verbally, to achieve understanding.
- Able to communicate complex matters and be persuasive.

Information and Knowledge:

- Understand types of information and knowledge required to support decision making.
- Able to translate and integrate various sources of information.
- Able to support timely, relevant and accurate communications.

Use of Information Technology:

- Understand issues, trends and how to integrate multi-media material into written, oral and visual presentations.
- Use current technology to complete work and make informed decisions.
- Evaluates the use of technology and, through benchmarking (review of best practices), identify opportunities for improvement and support of technical staff.

Internal and External Relations:

- Understand the importance and practices of successful media and other external relations activities required to communicate messages effectively.
- Understand various types of internal communications and processes used to gather and disseminate information.
- Engage in activities to improve internal and external relations activities.

Leadership:

Vision:

- Understand the importance of values and vision, and methods and processes for vision development and promotion.
- Apply a critical, integrative thinking approach to issues.
- Able to support the development of values and vision, monitor progress and identify when to make corrections.

Responsiveness and Influence:

- Anticipates future needs and developments.
- Understand how to effectively engage stakeholders in complex issues.
- Understand how to connect needs and solutions and influence decisions.
- Able to propose influential recommendations to key stakeholders.

Team Building:

- Understand team building techniques and dynamics.
- Act as a leader or member of a multi-function team.
- Build and motivate teams.

Climate of Excellence:

- Understand frameworks to support quality and performance measurement.
- Understand the meaning of accountability and practices to support accountability.
- Able to apply practices and tools to manage for results and achieve positive outcomes.

Managing Resources and Results:

- Understand policies and processes to effectively manage resources and results expected.
- Able to manage human and financial resources and achieve targeted results.
- Able to assess the use of resources and identify areas for improvement.

Professional and Ethical Behaviour:

Continuous Learning:

- Understand practices to support life-long learning, mentorship and coaching for self and others.
- Able to assess development needs.
- Engage in continuous learning and promoting the value of learning for self and others.

Ethical Standards:

- Understand ethical responsibilities and dilemmas for the professional planner.
- Understand and demonstrate adherence to establish ethical standards.
- Set highest standards for self and others, and monitors practice.

Professionalism:

- Understand the role of the professionals generally.
- Understand the role of the planner in the development of the profession.
- Monitor changes in the profession and demonstrate professionalism.
- Participate in activities to support development of the profession.