



## KEY INFORMATION

<b>RFP TITLE</b>	<p>The title of this Request for Proposal (RFP) is: <b>RFP – PSB: Mentorship Handbook</b></p> <p>Please reference this title in all correspondence.</p>
<b>CONTACT PERSON</b>	<p>The Contact Person for this RFP is: Ryan Jones, Operations Manager, Professional Standards Board (PSB).</p> <p>Email: <a href="mailto:operations@psb-planningcanada.ca">operations@psb-planningcanada.ca</a></p> <p>Please direct all enquiries, by email, to the Professional Standards Board (PSB) via the above-named contact person.</p>
<b>EVALUATION COMMITTEE</b>	<p>Professional Education and Examination Committee (PEEC) of the Professional Standards Board (PSB)</p>
<b>CLOSING TIME</b>	<p>The Closing Date &amp; Time is: May 21<sup>st</sup> 2025</p>

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## INTRODUCTION

The Professional Standards Board for the Planning Profession in Canada (PSB) is seeking proposals from qualified and experienced Registered Professional Planners (RPP/LPP) to produce a mentorship handbook. The PSB is committed to providing high-quality educational content to assist candidates in developing the competencies required to be certified as RPP's. We are inviting a consultant team which should include one RPP to submit proposals that outline their approach, qualifications, and cost estimates for this project.

The mentorship handbook would provide mentors with materials to easily prepare to deliver 1 year of monthly 1 hour mentorship meetings for a candidate. Mentorship is a critical step along the candidate pathway to RPP certification and we must ensure that mentors in Canada have to up-to-date knowledge and resources to provide a high-quality experience for candidates. The handbook would be in addition to the current mentorship guide which provides the basic overview of the mentorship process. 12 modules would be included in the handbook and would cover mandatory key topic areas as well as a selection of relevant supplementary materials. The handbook would also contain a section on effective strategies for being an effective mentor and a section on preparing candidates for their professional exam. The mentorship handbook would not be mandatory for mentors, only a suggested pathway of content for mentors new and old looking to deliver a quality mentorship to candidates.

Mentorship is a component for preparing candidates for the professional examination which is administered by the Professional Education and Examination Committee (PEEC). PEEC has undertaken significant work to update the question bank for the professional examination, the ethical foundations online course and test, the Study Guide for Candidates, and the Supplemental Reading Material to support candidate's preparation for the professional examination. The latter two items – the Study Guide and the Supplemental Readings – are available on the PSB website. Those interested in submitting on this RFP are encouraged to review both documents. The Guide for Candidate Members & Mentors available on the mentorship page of the PSB website should also be reviewed as a core reference point for the mentorship handbook.

Candidates are university educated planners currently working in the field of planning in Canada. Mentors are also university educated and have been RPP's for a minimum 3 years prior to becoming eligible to mentor a candidate. The handbook is to be written for adult learners. The handbook is to be focused on practicing professionals who are new to the profession.

## PURPOSE OF RFP

The intent of this RFP is to describe the scope of work for the development of a Mentorship Handbook to provide mentors with materials to easily prepare to deliver 1 year of monthly 1 hour mentorship meetings for a candidate. The handbook will assist mentors in mentoring candidates as they complete their candidate pathway and prepare for the Professional Examination administered by the Professional Standards Board for the Planning Profession in Canada.

## PROFESSIONAL STANDARDS BOARD (PSB)

The Professional Standards Board for the Planning Profession in Canada (PSB) operates the "Certification and Accreditation Administrative Services Program" (CAASP) for the Canadian Institute of Planners (CIP) and the Provincial/Territorial Institutes and Associations (PTIAs). The services provided to our clients under the program include certification of planners, the accreditation of university academic planning programs, and the development of standards of practice.

## PROFESSIONAL EDUCATION AND EXAMINATION COMMITTEE (PEEC)

The Professional Education and Examination Committee (PEEC), is a committee of the PSB, and oversees matters of certification, including the assessment of applications for PSB's processes and eligibility for Candidate membership in CIP and the PTIAs, verification of mentorship and sponsorship of work experience and the delivery of courses and examinations leading to credentialing as a professional planner.

## ELIGIBILITY

PEEC invites RPP planners, planning academics, educational consultants, mentorship experts, or adult learning specialists to submit proposals for this project. Submissions will be accepted by individuals (i.e. leader of the team), corporations, joint ventures, partnerships or any other legal entities suitably able to fulfill the requirements of this work. This work is best suited to those with experience in developing mentorship and certification programs for small/medium sized certification bodies. Subject matter expertise in land use would be considered an asset. Consulting teams should include at minimum 1 RPP.

# THE OPPORTUNITY

## BACKGROUND

The Professional Standards Board (PSB) was founded in October 2012. The Board administers the certification process for planners and began administering the Professional Examination on behalf of the Provincial/Territorial Institutes and Associations (PTIA) in 2013. The PSB administers the process for candidates to become Registered Professional Planners which includes a series of requirements: mentorship, sponsorship, logging of experience, completion of the online Ethics and Professionalism Course, and successful completion of the final examination (proctored multiple choice examination consisting of 90 questions).

## QUALIFICATIONS

The successful consultant(s)/adult learning specialist(s) selected to conduct the development of the mentorship handbook will:

- Demonstrate experience writing educational content in a professional context for adult learners
- Demonstrate experience developing mentorship programming in a professional context.
- Demonstrate an understanding of document/publication design principles, including accessibility
- Demonstrate a range of relevant expertise to conduct the proposed scope of work
- Demonstrate experience working directly or within the planning profession in Canada and demonstrate experience with mentorship of candidates.
- Preferably have skills in graphic design (or works with a graphic designer) to create visually- appealing publications in line with PSB brand guidelines.

## SCOPE OF WORK AND METHODOLOGY

The selected consultants will be responsible for the following:

Content Review and Development

a. Review the Guide for Candidate Members & Mentors.

b. Consultants should estimate their time based on:

1. A new 12 module handbook which focuses on the core topics areas from the mentorship guide. Modules should break up the content into manageable user-friendly sections for mentors and candidates to read and prepare to discuss ahead of 1 hour monthly meetings.
  2. A section on effective strategies for being an effective mentor.
  3. A section on preparing your mentee for the exam.
- e. Content to reflect current industry standards, regulations, and best practices.
- f. Incorporate/create content that aligns with the Professional Exam, Study Guide, Supplementary Reading Materials.
- g. Ensure that the handbook materials align with the Professional Standards Board's objectives.
- h. Address any issues or updates required after the launch of the updated course and test.

#### Resources Available

1. Review the Guide for Candidate Members & Mentors.
2. Study Guide and Reading Material for the Professional Examination.
3. The Ethical Foundations Course modules.
4. Sub-committee of PEEC (1-2 members) and staff from the PSB to guide the project.
5. Canadian Institute of Planners Code of Professional Conduct.
6. PSB Brand Guidelines.

## DELIVERABLES

The final deliverables for this project are an easy-to-read, accessible 12 module mentorship handbook document that will be published electronically on the PSB website and includes an interactive Table of Contents and Executive Summary describing the purpose and intent of the handbook. In addition, the handbook shall include a section on effective strategies for being an effective mentor and a section on preparing your mentee for the exam. The proponent will first prepare a plan for the development of the handbook as a touchpoint before the main deliverables are completed.

## PROPOSAL SUBMISSION

Interested consultants are invited to submit their proposals, which should include the following:

**Company/Team Overview:** Provide an overview of your experience in developing educational material about planning, mentorship, ethics, professionalism, the public interest, and emerging issues in the planning profession.

**Approach:** Outline your approach for developing the PSB mentorship handbook, including your methodology, timeline, and key milestones.

**Qualifications:** Describe the qualifications and experience of your team members who will be working on this project.

**Cost Estimate:** Provide a detailed cost estimate, including all expenses associated with the project, such as content development, reading materials referenced for inclusion or in preparation, graphic design.

**References:** Include references from previous clients who can attest to your ability to deliver high-quality online courses and tests.

## TIMELINE

Proposal Submission Deadline: May 21<sup>st</sup> 2025

Selection: June 9<sup>th</sup> 2025

Project Kick-off: June 2025

Project Timing: It is PEEC's goal to have this handbook complete by the end of 2025

## SELECTION PROCESS

## SUBMISSION REQUIREMENTS

The PSB requests the proposal be organized as outlined below in order to facilitate the evaluation and review process. If the project team wishes to include additional or supporting information, this should be placed in an appendix and referenced in the main body of the proposal.

1.0 – Cover Letter

2.0 – Table of Contents

3.0 – Executive Summary

4.0 – Experience

- a. – Corporate Profile
- b. – Team Members Profiles and hourly rates
- c. – References

5.0 – Services

- d. – Project Understanding
- e. – Approach and Methodology
- f. – Project Execution
- g. – Project Schedule

6.0 – Fees

6.1 – Proposed Costs & Associated Fee(s) for Services

7.0 – Additional Features / Value Added

8.0 – Appendix (As deemed necessary to provide additional information)

## EVALUATION

Submissions will be assessed by PEEC. Applicants may be requested to submit additional information to clarify their proposal if required. Applicants may also be required to meet with PEEC,



to provide additional information if required. Submissions will be evaluated based upon the following criteria:

	Criteria	Weighting
1	<b>Evaluation of relevant experience of the applicant and/or firm:</b> relevant credentials; demonstrated experience working with land use planners or other professional organizations on similar projects; demonstrated experience in successful engagement of stakeholders. Three references are required	30%
2	<b>Evaluation of proposed approach and methodology:</b> creativity of the proposed strategy; evidence of the applicant's understanding of the project requirements, constraints and risks; clear connection between the proposed approach and the highlighted scope of work and expected deliverables; evidence confirming that the project can be delivered effectively & successfully	30%
3	Work plan and schedule: <b>evidence confirming that the project will be completed by December 31<sup>st</sup>, 2025.</b>	15%
4	<b>Evaluation of proposed fees:</b> a review of anticipated fees and ancillary costs; a value analysis	25%
	<b>Total</b>	100%

Please be as specific as possible about the nature and scope of work to be performed, time required, and costs.

## SUBMISSION INSTRUCTIONS

### SUBMISSION

Responses to this RFP must be received at the email address before the closing time as stated on the cover of this RFP:

- (a) Responses received after the closing date will not be considered and will not be returned.
- (b) Email responses will be accepted and is preferred (please use subject line “PSB/PEEC RFP”).

## RECEIPT OF COMPLETE RFP

Respondents are solely responsible to ensure that they have received the complete RFP, as listed in the table of contents of this RFP, plus any addenda. Each and every response is deemed to be made on the basis of the complete RFP issued prior to the closing time. PSB accepts no responsibility for any respondent that does not receive all RFP information.

## CONTACT INFORMATION

We look forward to receiving your proposal and potentially partnering with your organization to update the PSB Online Course and Test. If you have any questions or need further information, please do not hesitate to contact us.

All inquiries and proposals should be directed to:

[operations@psb-planningcanada.ca](mailto:operations@psb-planningcanada.ca)

Ryan Jones

Operations Manager / Directeur des opérations

Professional Standards Board (PSB) for the Planning Profession in Canada/Conseil des normes professionnelles (CNP) pour la profession de l'urbanisme au Canada