



PROFESSIONAL
STANDARDS
BOARD
FOR THE PLANNING
PROFESSION IN CANADA

MENTORSHIP HANDBOOK



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2026 EDITION

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ONE

PREFFACE



Canmore, Alberta

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HANDBOOK INTRODUCTION

PURPOSE

The Handbook is designed to support the mentorship journey between an experienced professional planner and a candidate preparing to sit the Professional Examination and achieve the Registered Professional Planner (RPP) certification through their Provincial and Territorial Institute or Association (PTIA).

The Handbook provides a structured framework of modules, suggested activities, and conversation prompts to help the mentor deliver module sessions with their mentee aimed at professional development, reflective practice, and exam preparation.

The Handbook balances structure and flexibility. While we provide a recommended path to undertake the mentorship modules, each mentorship journey is unique. Mentors and mentees are encouraged to adapt the guide to their context, interests, and schedules.

At minimum, it is expected that a core mentorship pathway (described in the following pages) is maintained to ensure a comprehensive and standard experience that supports effective preparation for the **Professional Examination** and positions the mentee for a successful career in planning.

WHY MENTOR?

Mentoring provides an opportunity to help support the next generation of professional planners while reflecting on and sharing your own professional experience. By guiding a mentee through ethical, practical, and examination-related challenges, you help strengthen the planning profession and responsible and thoughtful planning practice.

Mentoring also allows you to refresh your knowledge, gain new perspective, and contribute to the development of new skills and competencies that support sound decision-making in your own practice.

USING THE HANDBOOK

The Handbook offers a structured **12-module mentorship journey** while also allowing flexibility for the mentor and mentee to tailor it to their own needs. It unites foundational planning knowledge, enabling and functional competencies, ethical considerations, and professional responsibilities through emphasis on both experiential- and scenario-based approaches to exam preparation.

By following the activities and conversation prompts contained in each of the 12 modules, mentors and mentees can engage in meaningful dialogue, reflective practice, and applied learning that supports both career development as a practicing planner and successful completion of the **Professional Examination**.

THE MENTORSHIP JOURNEY



The 12 modules are provided to guide the mentorship journey over the expected delivery period of **one year**. Each module session is intended to be approximately **one hour in length**, with some additional preparatory time required in advance.

THE MENTORSHIP JOURNEY STRUCTURE

#	Title	Purpose
Mentorship Introduction		Modules 1 - 2
1 Ⓢ	Orientation	Establish a shared foundation for the mentorship process, clarify expectations, and set goals for the journey.
2 Ⓢ	Exam Fundamentals	Connect the mentorship journey to the Professional Examination and discuss effective preparation strategies.
Foundational Topics in Planning		Modules 3 - 6
3 Ⓢ	Planning and Ethics	Reflect on the Canadian Institute of Planners (CIP) Member Code of Professional Conduct and connect the mentorship journey to the Ethics and Professionalism Course and Test .
4 Ⓢ	Planning and the Public Interest	Deepen the candidate's understanding of the planner's responsibility to the public interest.
5 Ⓢ	Professional Responsibilities and Conduct	Address issues of professional responsibility, including competences, independence, integrity, professionalism, and diligence.
6 Ⓢ	Planning in the Public and Private Sector	Explore how the public and private sector shape the role of the planner and raise different questions surrounding ethics, interest, and responsibility.
Professional Competencies in Planning		Modules 7 - 8
7	Functional Competencies	Explore the functional competencies (i.e., knowledge of human settlement and community, plan and policy considerations) and how they relate to matters of ethics, public interest, and professional responsibility.
8	Enabling Competencies	Explore the enabling competencies (i.e., critical thinking, communication, interpersonal skills) and how they complement ethical action, stewardship of the public interest, and professional development.

Continued on next page →

Ⓢ Core module offering

#	Title	Purpose
Professional Reflection and Adaptation		Modules 9 - 12
9	Reflection I: Learning from Scenarios	Encourage applied learning through exploration of common scenarios in planning practice.
10	Special Topics in Planning Practice	Discuss important social, cultural, economic, and/or environmental factors that shape and are shaped by planning practice. Topics include Truth and Reconciliation, climate change, artificial intelligence, and equity, diversity, and inclusion (EDI).
11	Reflection II: Learning from Experience	Review real project experience and connect to topics of public interest, professional responsibility, ethics, and enabling and functional competencies. Explore common professional obstacles and opportunities for resilience as a planner.
12	Career Planning and Professional Development	Reflect on the mentorship year, review remaining steps towards sitting the Professional Examination , discuss plans for future growth, and summarize major outcomes from the journey.

Note: You may opt to vary the delivery order of the 12 modules to suit your needs. If this approach is taken, we recommend that Modules 1, 2, and 12 – which provide foundational mentorship orientation, exam preparation, and career reflection opportunities, respectively – be completed in the standard sequential order presented here.

🕒 Core module pathway

A recommended core pathway of modules ensures coverage of critical knowledge and exam-relevant content. At minimum, mentors should ensure the completion of seven modules listed here.

1. Orientation
2. Exam Fundamentals
3. Planning and Ethics
4. Planning and the Public Interest
5. Professional Responsibilities and Conduct
6. Planning in the Public and Private Sector
10. Special Topics in Planning Practice

Note: The numbering on the right corresponds to the position in the 12-module structure.

MAKING THE MOST OF YOUR MEETING

The following recommendations are provided to make the most of your time spent together in each module session.

Alignment with the overarching goals: Understand how the module contributes to the broader mentorship goals of fostering ethical behaviour and professional responsibility, understanding the public interest, and ensuring exam readiness.

Purpose and objectives: Review the purpose and objectives of the current module to ensure the session is focused and that both mentee and mentor understand the outcomes that will be achieved through the successful completion of a module.

Suggested activities: Some module activities require advanced reflection, reading, and/or the completion of “homework” items. Time should be spent at the conclusion of the preceding module session to plan for the next module; for instance, which of the suggested activities are the mentee and mentor interested in discussing in the next session? Ensure sufficient time between meetings to allow for unhurried preparation time.

Conversation prompts: Use the provided conversation prompts to guide discussion and reflection. The prompts are aligned with the module’s purpose and activities but can be adapted in real-time to suit the mentee’s learning style, professional background, level and type of experience, and emerging questions.

Resources: The majority of the modules include additional resources that the mentee can consult for more information about the topics discussed in the module. While these resources are not considered required reading, review is strongly recommended to help clarify and contribute to understanding of key topics.

These resources support preparation for the **Professional Examination**, and include offerings from the CIP and the Professional Standards Board (PSB):

- CIP Member Code of Ethics and Professional Conduct
- Ethical Foundations For Professional Planners Course
- Guide for Candidate Members and Mentors
- Mentorship Agreement and Record of Mentorship
- Professional Examination Additional Readings, and the
- Professional Examination Study Guide

Note: Appendix 3 of the **Professional Examination Study Guide** provides a comprehensive list of additional readings organized by topic area and aligned with the companion Professional Examination Additional Readings resource.

This Handbook includes a selection of these additional readings within the majority of the provided modules.

Concluding Tasks: At the conclusion of each module, mentors should:

- Prompt the mentee to update their candidate logbook with relevant reflections, learning outcomes, and connections to practice.
- Update the Record of Mentorship with the topics discussed, action items to complete by the following session, and impressions from both mentor and mentee concerning outcomes, areas of strength, and areas for improvement.
- Schedule the next meeting and review any identified preparatory activities associated with the upcoming module.
- Determine if any logistical steps related to the **Ethics and Professionalism Course** or the **Professional Examination** (e.g., sign-up, scheduling, communication with the mentee's PTIA or Professional Standards Board) are required.

CLOSING

Thank you for committing your time, experience, and professional judgement to this process. By assuming the role of mentor, you are helping to strengthen the planning profession in Canada and helping a future colleague begin their career with confidence, clarity, and integrity.

Each mentorship is unique to the individuals involved – no two journeys will look the same, and that diversity is a core strength of the mentorship model. This guide offers a structured framework, but it's meant to be adapted to fit the needs, goals, and working styles of each mentor-mentee pair while still supporting key learning outcomes. Bring your perspective, stay curious, and shape the journey together.

We wish you a rewarding, thoughtful, and enjoyable mentorship journey.



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Victoria, British Columbia

EFFECTIVE STRATEGIES

An effective mentorship requires more than simply sharing experiences; it involves structured guidance, opportunities for reflection, and a collaborative approach to supporting the mentee’s growth over time.

This section provides a selection of strategies to help mentors maximize the impact of their guidance, foster a practice of professional development, and support successful preparation for the Professional Examination. These recommendations balance practical advice, structured learning, and reflective discussion.

This will ensure the mentorship journey is meaningful and focused on the achievement of a core purpose: the completion of the **Professional Examination** and the mentee candidate’s accreditation as a full member of their PTIA.

RECOMMENDATIONS

- 1. Establish a consistent meeting schedule:** Set a regular meeting schedule and follow it. Consistency helps build trust and ensures the mentorship journey progresses at a consistent and predictable pace. Encourage your mentee to maintain regular updates to their logbook and the Mentorship Record immediately after each meeting, so you both have a clear record of progress over time.
- 2. Agree on shared expectations:** At the outset, co-sign a Mentorship Agreement (or co-create your own) that clearly defines your shared expectations. At a minimum, understand that the mentorship is intended to support the mentee's preparation for the Professional Examination. However, the journey also provides an opportunity to share professional insights and prepare the mentee for a successful career in planning. Be realistic about what you can accomplish in your time together and regularly revisit the core intent of the mentorship to ensure continued alignment.
- 3. Reinforce foundational topics:** Throughout the mentorship process, look for opportunities to weave in the foundational topics of ethical behaviour, public interest, and professional responsibility. These concepts should be referenced in both discussions and exercises, as they underpin both the Professional Examination and professional practice. The structure of the mentorship modules is designed to support this integration.
- 4. Evaluate and support progress:** Use the module activities to continuously assess the mentee's knowledge, skills, and areas for potential improvement. Observing how they relate the material to real-world contexts, complete exercises, and engage in discussions will help you to gauge their readiness for the Professional Examination. This also allows you to tailor your guidance and adjust the pacing of the mentorship journey to meet the mentee's needs.

5. **Treat the journey as shared learning:** Approach mentorship as a two-way dialogue and an opportunity for reciprocal learning. While you bring invaluable experience and expertise, the mentee's perspective can refresh your understanding of contemporary topics, trends, and approaches in planning. Be sure to maintain curiosity and openness throughout this journey.
6. **Balance experience with structured learning:** Leverage your professional experience to illustrate concepts and provide necessary context, but avoid dominating discussions with "war stories." Use examples strategically to illuminate the practical application of ethics, professional responsibility, and thoughtful planning practice. Ensure that the mentee is actively drawing lessons from both provided materials and self-identified learning opportunities, and is connecting them to both their preparation for the Professional Examination and career growth.
7. **Encourage reflection and growth:** Support your mentee in reflecting on each module, exercise, and discussion. Prompt them to consider how their skills and knowledge are developing over time, where gaps remain, and how they can apply these lessons to both the Professional Examination and professional practice. Encourage journaling, scenario analysis, and other reflective exercises as part of this process.
8. **Maintain flexibility and adaptability:** Every mentorship relationship is unique. Adapt your approach to the mentee's learning style, strengths, and areas for growth, while remaining grounded in the structure and goals of the Handbook. A flexible and responsive mentorship journey will prove more effective and enjoyable than a rigid approach for both mentee and mentor.
9. **Keep the big picture in mind:** Finally, remember that the ultimate goal of the mentorship is twofold: to prepare the mentee to successfully sit the Professional Examination and to cultivate in them the skills, judgment, and professional habits required for a long and rewarding career in planning. Take every discussion, activity, and reflection as an opportunity to support both outcomes.



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Charlottetown, Prince Edward Island

PREPARING FOR THE EXAM

THE PROFESSIONAL EXAMINATION

Ensure both you and your mentee understand the format, procedure, logistics, and preparatory requirements for the Professional Examination.

It is a formal, multiple-choice examination that is offered twice each year – once in the spring and once in the fall.

The purposes of the Professional Examination are to:

- Assist in assessing the mentee’s suitability for admission to full (certified) membership in their PTIA
- Evaluate the mentee’s understanding, comprehension, interpretation and ability to consistently apply the CIP Member Code of Ethics and Professional Conduct,
- Assess the mentee’s comprehension and understanding of broader issues of professionalism and related, relevant competencies for professional planners

The latest terms and conditions and frequently asked questions are found on the Professional Standards Board website and should be consulted throughout the mentorship journey.

While each module is designed to help prepare the mentee to successfully sit the Professional Exam, modules 2 (“Exam Fundamentals”), 9 (“Reflection I: Learning from Scenarios”) and 12 (“Career Planning and Professional Development”) are direct opportunities to discuss exam requirements, the types of questions to expect, and address specific questions about the exam process. As a result, these should form key milestones in the mentorship journey that help affirm the mentee’s progress over the journey.

STUDY RESOURCES

The **Professional Examination Study Guide**, **Additional Readings**, and **CIP Member Code of Ethics and Professional Conduct** are identified throughout this process as important resources to review and revisit. Each module includes a Resources section, where mentees interested in learning more about the module's topics can review selected excerpts from the PSB-provided materials to further study the module topic area and prepare for the Professional Examination.

EXPERIENTIAL LEARNING

Understand that review of the provided materials is only a part of the journey. The Professional Examination will also ask mentees to thoughtfully relate their own diverse and significant experiences in responsible professional planning to correctly respond to a number of challenging scenario-based questions.

The mentorship journey offers many opportunities for both the mentee and mentor to discuss experiential learning with specific reference to real-world situations and lived experiences to ensure the mentee is well positioned to think in these terms prior to sitting the Professional Examination.

ONGOING SUPPORT

Should the mentor (or mentee) feel that the mentee remains unprepared to sit the Professional Examination at the conclusion of the structured 12-month mentorship journey, the mentee should continue to meet with the mentor on a regular "check-in" basis.

During these check-in sessions, the mentee should proactively revisit areas for improvement that have been identified through the delivery of the 12-module journey and regular completion of the Record of Mentorship. Similarly, they should use these additional sessions as an opportunity to raise and address questions emerging from review of the **Professional Examination Study Guide** and **Additional Readings** package.

FOR THOSE WITH EXPERIENCE UNDER A PRIOR PROCESS

An important goal of the mentorship journey is to provide guidance that is accurate, relevant, and directly supportive of the mentee's success under the current PSB process.

Mentors who achieved candidacy with their PTIA prior to 2013 should be aware that the accreditation process they experienced differs significantly from the current PSB process, which has applied to candidates since 2013. Similarly, mentors who achieved full PTIA membership under the 2013-2015 examination did so under a long-answer format, whereas the current exam (at writing) is a multiple-choice offering.

Mentors should avoid referencing older exam formats or comparing current candidates' experiences to their own under prior accreditation processes, as this may create confusion or set unrealistic expectations.

Mentors may share general insights on study habits, reflective practice, and integrating functional and enabling competencies, provided these recommendations are independent of outdated exam formats or process structures. This includes directing candidates to the current Professional Examination Study Guide and Additional Readings package, and emphasizing preparation strategies appropriate for multiple-choice questions.

THE ETHICS AND PROFESSIONALISM COURSE AND TEST

The Ethics and Professionalism Course and Test is not the primary focus of this mentorship journey. However, because of its relevance to the mentee's understanding of ethics and professional interest and its status as a pre-requisite to sit the Professional Examination, it has been woven into Module 3 ("Planning and Ethics").

The mentee is encouraged to complete the course and sit the Test well in advance of the Professional Examination to ensure any feedback and lessons learned from that experience can be factored into their subsequent preparation for the latter examination.

TWO

MODERN BUILDINGS



Toronto, Ontario

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ORIENTATION

PURPOSE

The first module establishes the foundation for the mentorship journey. It provides an opportunity for the mentor and mentee to share experiences, discuss motivations, and clarify expectations for the year ahead. Together, they will begin building a collaborative relationship grounded in trust, reflection, and professional growth. Completing a competency assessment, setting goals, and formalizing the Mentorship Agreement creates a shared roadmap that links the mentee's preparation for the Professional Examination with their broader development as an ethical, reflective, and responsible planner.

By the end of the first meeting, both mentor and mentee should have a clear understanding of their roles, responsibilities, and general meeting schedule for the mentorship journey.

OBJECTIVES

1. Establish trust, rapport, and shared expectations for the mentorship relationship and the journey ahead.
2. Guide the mentee in articulating their goals, motivations, and priorities for the mentorship period.
3. Introduce and situate the mentorship journey within the PSB's functional and enabling competencies for RPP certification.
4. Help the mentee connect their current experience, motivations, and self-assessment to the structure and requirements of the accreditation process.
5. Complete the Mentorship Agreement and agree upon a meeting schedule to create a shared roadmap for future sessions.

SUGGESTED ACTIVITIES**Mentee Activities:**

- Complete a self-assessment of functional and enabling competencies.
- Identify learning goals for the year.
- Work with your mentor to complete the Mentorship Agreement.
- Share your background, interests, and motivation for pursuing RPP certification.

Mentor Activities:

- Share your own RPP journey, including key lessons and challenges.
- Help set norms for communication and expectations.
- Support the mentee in aligning their goals with certification requirements.
- Reflect on the mentee's self-assessment to suggest areas of focus.

CONVERSATION PROMPTS

- What are the mentor / mentee's expectations for this mentorship relationship?
- What skills or areas would the mentee most like to develop over the mentorship year?
- How does the mentee prefer to receive feedback and guidance?
- What does the mentee consider their greatest strengths and areas for growth as a planner so far?
- Are there specific challenges the mentee anticipates in the year ahead, and how might mentorship help address them?
- What does a successful mentorship experience look like to the mentor / mentee?
- What strategies did the mentor find useful in completing their candidacy?
- What obstacles did the mentor experience during their path to candidacy?

RESOURCES

General:

- PSB Mentorship Record
- Mentorship Guide for Candidate Members and Mentors
- Mentorship Agreement
- [Competency Assessment Template](#)



Unsplash /Joban Khangura

Winnipeg, Manitoba

EXAM FUNDAMENTALS

PURPOSE

The second module connects the mentorship journey to the Professional Examination. The mentor and mentee will review exam procedure and expectations and consider effective strategies to prepare for and sit the exam. By reviewing the **Professional Examination Study Guide**, completing practice questions, and reflecting on areas of strength and areas for improvement, the mentee will begin to identify effective preparation strategies that can connect to other modules in the mentorship journey. This discussion also enables the mentor to understand where targeted support can best support the mentee for a successful exam outcome.

OBJECTIVES

1. Clarify the format, procedure, and expectations of the Professional Examination for the mentee.
2. Discuss the mentee's perceived strengths and gaps related to the exam content areas (i.e., knowledge and understanding of ethics, the public interest, and professional responsibility).
3. Guide the mentee in using the **Professional Examination Study Guide** to prepare for the exam.
4. Introduce **Professional Examination Study Guide** practice questions to help the mentee assess readiness and learning needs.
5. Support the mentee in developing effective strategies for both studying and sitting the exam, including mapping the mentee's identified learning needs to later mentorship modules or targeted support from the mentor.

SUGGESTED ACTIVITIES

Mentee Activities:

- Review the **Professional Examination Study Guide** and complete practice questions.
- Discuss strategies for exam preparation and how the mentorship journey can support the preparation process, including attending to areas of strength and areas for improvement.
- Ask clarifying questions about exam structure, procedure, and expectations (i.e., timing, format, level of depth expected).
- Draft a preliminary study plan or timeline informed by gaps identified, and connect logbook development to exam preparation.

Mentor Activities:

- Share personal approaches to studying and preparing for the Professional Examination, including strategies for managing time, practice, and stress.
- Adjust mentorship focus to emphasize areas of weakness, and suggest targeted learning activities or resources.
- Provide guidance on structuring a study plan, prioritizing topics, and integrating mentorship support into exam preparation.
- Encourage logbook integration, helping the mentee document examples and reflections from practice questions or past projects.

CONVERSATION PROMPTS

- Which areas of the **Professional Examination Study Guide** do you find most challenging, and why?
- How do you plan to connect planning theory (i.e., what you learned during your academic career) to professional practice during your study?
- Can you identify areas where mentorship support would most help you address gaps or strengthen your understanding?
- How could examples from your professional experience or case studies be used to reinforce your learning and document competencies in your logbook?
- Are there patterns in your practice question results that highlight specific topics or skills to focus on in upcoming modules?

RESOURCES**General:**

- Professional Examination Study Guide (“Introduction”, “the Exam Process”, “Exam Preparation”, “Examination Time”)
- [PSB Website – Professional Examination](#)



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Saskatoon, Saskatchewan

PLANNING AND ETHICS

PURPOSE

The third module begins the formal exploration of foundational topics in planning with a focus on professional ethics. The session provides an opportunity to explore a planner's ethical responsibility to the public interest, clients, employers, their profession, and fellow members. By reflecting on both personal and professional values, discussing lived experience of ethical challenges, and analyzing case studies from the PSB's *Ethical Foundations for Professional Planners* course, the mentee will deepen their understanding of the ethical dimensions of planning practice.

The discussion will also enable the mentor to assess the mentee's grasp of ethical concepts, share real-world experiences with professional dilemmas, and guide reflection on navigating tensions between competing professional obligations and interests in a responsible and ethical manner.

OBJECTIVES

- Guide the mentee in identifying and analyzing key ethical issues in planning through practice questions from the *Ethical Foundations for Professional Planners* course.
- Facilitate reflection on the mentee's personal and professional values and how they influence decision-making.
- Support discussion of ethical challenges from the mentee's workplace, exploring alternative approaches and outcomes.
- Help the mentee evaluate professional responsibilities to clients, the public, employers, the profession, and fellow members.
- Encourage the application of ethical reasoning to navigate tensions between competing obligations in real-world planning scenarios.

Note: The mentor does not have access to the *PSB Ethical Foundations for Professional Planners* course, and so will be dependent on the mentee bringing forward relevant questions to discuss from review of course material. This module can be used as an early indicator of mentee proactivity and preparation for the required Ethics and Professionalism Course and Test.

SUGGESTED ACTIVITIES

Mentee Activities:

- Raise questions from the PSB Ethical Foundations for Professional Planners course for discussion, if any.
- With reference to the CIP Member Code of Professional Conduct, identify potential ethical dilemmas in planning practice and consider strategies to navigate them responsibly.
- Reflect on a planner's personal values and consider how they influence professional decision-making.
- Discuss an ethical challenge encountered in the workplace, including how it was addressed and lessons learned. Document reflections and insights in a logbook or mentorship journal for later reference.

Mentor Activities:

- Share ethical dilemmas from professional experience to illustrate real-world complexity.
- Facilitate reflection on balancing professional responsibilities to clients, the public, employers, and the profession, including discussion of areas of tension.
- Encourage documentation of ethical reflections and lessons in the mentee's logbook.

CONVERSATION PROMPTS

- How do the examples of possible non-compliance presented in the CIP Member Code of Professional Conduct relate to challenges you've observed?
- Describe an ethical challenge you've faced at work. How did you respond?
- In what ways do your personal values currently shape how you make or recommend planning decisions? Where is it appropriate for personal values to inform your approach? Where must those values be held back in favour of professional obligations, evidence, policy, or the public interest?
- Reflect on a concrete example where the line between personal values and professional responsibility was either clear or difficult to manage.
- How might you balance client, public, and professional duties? When faced with conflicting responsibilities, what strategies or principles guide your decision-making?

RESOURCES

General:

- CIP Member Code of Professional Conduct and Statement of Values
- PSB Ethical Foundations for Professional Planners Course ("Module 2: Professional Ethics")
- Professional Examination Study Guide ("Ethics")

**Professional Examination
Additional Readings:***Section 1 – Ethics:*

- Schweitzer (2017), "Introduction: Planning Ethics in the 21st Century", *Journal of the American Planning Association* 83(2), p. 40
- Lauria and Long (2017), "Planning Experience and Planners' Ethics", *Journal of the American Planning Association* 83(2), p. 56



Unsplash / Chen Liu

Halifax, Nova Scotia

PLANNING AND THE PUBLIC INTEREST

PURPOSE

The fourth module continues the exploration of foundational planning topics, focusing on the public interest. This session provides an opportunity to deepen the mentee's understanding of a planner's responsibility to the public interest by considering who constitutes the public, how decisions are made to support the public, and how competing interests are mediated.

The mentee and mentor will discuss the CIP Member Code of Professional Conduct and Statement of Values along with contentious planning issues. The latter may be identified by the mentor or mentee or drawn from Ontario Municipal Board decisions in the Professional Examination Additional Readings package. Through this module, the mentee will develop a richer appreciation of how the public interest both shapes and is shaped by planning processes.

The discussion also allows the mentor to share real-world experiences in balancing different aspects of the public interest, such as confidentiality versus transparency, public sentiment versus professional expertise, or environmental protection versus urban development. Mentors can highlight how stakeholder engagement is integrated into decision-making at the municipal level, helping the mentee understand the practical application of professional responsibility in complex planning contexts.

OBJECTIVES

1. Guide the mentee in exploring who/what comprises the public interest and how it is defined in planning practice.
2. Facilitate discussion on how competing interests, such as the public, clients, employers, and the natural environment, can be balanced in planning decisions.
3. Support analysis of contentious planning issues through self-selected case studies or Ontario Municipal Board decisions (included in **Professional Examination Additional Readings** under Resources), highlighting how public interest considerations are applied in practice.
4. Share real-world experiences illustrating the complexities of balancing transparency, professional judgment, and interest-holder engagement.
5. Help the mentee connect these insights to the development of functional and enabling competencies, and to the logbook documentation.

SUGGESTED ACTIVITIES**Mentee Activities:**

- Analyze a contentious planning case (from self-selected research, a current event in municipal politics, or an assigned resource such as Ontario Municipal Board case in **Professional Examination Additional Readings**) where multiple interpretations of the public interest were present.
- Map the competing interest-holder perspectives (e.g., public vs. developer; environmental vs. economic; disclosure vs. confidentiality) in your review.
- Identify and reflect on the inherent tensions, focusing on which obligations pulled the planner in different directions and why.

Mentor Activities:

- Share one or more examples from experience where different interpretations of the public interest shaped, delayed, or otherwise complicated a planning decision.
- Walk through an interest-holder engagement process used to surface and weigh competing interests, including discussions of tensions encountered (e.g., when public sentiment conflicts with established municipal policy, etc.).
- Explain strategies used to navigate tensions, such as reconciling policy direction with public input, or balancing environmental protection with housing development.
- Model how to analyze contentious files (i.e., how to structure reasoning, identify who “the public” is in context, and surface implicit assumptions).
- Provide targeted feedback on the mentee’s case analysis, with attention to ethics, public interest reasoning, and professional responsibility.

CONVERSATION PROMPTS

- How do you define the public interest in the context of your own work? Who are the relevant rights-holders, authorities, and interest-holders that represent “the public” in your area of practice?
- Describe a situation where competing interpretations of the public interest created tension in a planning decision. What made the tension difficult to resolve?
- When faced with competing interests, how might you systematically unpack and address them? What thought process or criteria would (or did) you apply?
- How do interest-holder or rights-holder engagement processes assist (or complicate) decisions made in the public interest? Can you name an instance where engagement shifted the outcome?

RESOURCES**General:**

- CIP Member Code of Professional Conduct and Statement of Values
- PSB Ethical Foundations for Professional Planners Course (“Module 3: Obligation to Uphold the Public Interest”)
- Professional Examination Study Guide (“Public Interest”)

Professional Examination Additional Readings:*Section 2 – Public Interest:*

- Grant (2005), “Rethinking the Public Interest as Planning Concept”, *Plan Canada*, p. 130
- Dadashpoor and Sheydayi (2021), “Defining Public Interest in Planning”, *Journal of Planning Literature* 36(4), p. 142
- Ontario Municipal Board, Case No(s). PL140240/ PL140317, 822403 Ontario Inc. v. Oakville (Town)



Unsplash /Bipin Saxena

Ville de Québec, Québec

PROFESSIONAL RESPONSIBILITIES AND CONDUCT

PURPOSE

The fifth module continues the exploration of foundational topics in planning with a focus on the professional responsibilities and conduct expected of accredited professional planners. The session examines how principles of competence, independence, integrity, professionalism, and diligence shape not only the delivery of sound planning practice but also the planner's role within systems of governance and public accountability.

Building on concepts introduced in the PSB Ethical Foundations for Professional Planners course, the discussion will provide opportunity to explore real-world professional experiences and review the supporting resources to deepen understanding of what it means to act as a member of a regulated profession. In doing so, the mentee will connect the formal expectations of accreditation to the lived realities of practice.

The mentor will offer high-level guidance on navigating conflict, managing pressures from clients or decision-makers, and delivering independent, evidence-based professional opinions rooted in rigour and due diligence.

OBJECTIVES

1. Reinforce the professional principles associated with accredited planning practice, including competence, independence, integrity, diligence, and professionalism.
2. Demonstrate through example how these principles shape day-to-day decisions, advice, and conduct in work with clients, colleagues, elected councils, external agencies, and the public.
3. Guide the mentee in analyzing situations where professional responsibilities may conflict with organizational pressure, political direction, or public sentiment.
4. Reflect on professional identity and what it means to act as a representative of a regulated profession and the duties it entails.
5. Provide strategies and framing for delivering independent, evidence-based opinions in the context of disagreement, risk, or conflict.

SUGGESTED ACTIVITIES

Mentee Activities:

- Review a recent professional experience for potential ethical or professional conflicts (e.g., pressure from client/employer, political direction vs. available evidence, confidentiality vs. disclosure).
- Role-play or debrief how you responded, or would respond, to the tension in practice.
- **If no suitable example is available from professional experience:** select and review one assigned reading or section from the recommended readings (e.g., PSB Ethical Foundations for Professional Planners Course Modules 4 and/ or 5; Professional Examination Study Guide – “Professional Responsibility”) and prepare a short reflection identifying the conflict, options, constraints, and a defensible professional course of action.

Mentor Activities:

- Share one or more real examples of how you navigated conflict or pressure in practice, including how you maintained competence, independence, diligence, and integrity.
- Model how to frame and deliver an independent, informed, and defensible professional opinion when facing organizational, political, or public pressure.
- Where the mentee has used a reading-based substitute scenario, guide them in testing their reasoning against general standards of professional responsibility and the CIP Member Code of Professional Conduct.

CONVERSATION PROMPTS

- How do you identify potential conflicts in your work, and what strategies do you use to manage them responsibly?
- What are a planner's professional responsibilities to clients, employers, and the public, and how do you balance them in practice?
- Share an example (from experience or a reading-based case) of delivering an independent and professional opinion. What ethical or practical challenges did you face, and how did you address them?
- Not all planning processes are created equal. How can a planning process be structured to support behaviours like diligence, integrity, and professional competence? Where might these practices be difficult to maintain, and how would you address those challenges?
- How would you document your reasoning and lessons learned in your logbook to demonstrate the principles associated with professional conduct?

RESOURCES**General:**

- CIP Member Code of Professional Conduct and Statement of Values
- PSB Ethical Foundations for Professional Planners Course (“Module 4: Professional Responsibility – Competence and Independence”, “Module 5: Professional Responsibility – Integrity and Professionalism”)
- Professional Examination Study Guide (“Professional Responsibility”)

Professional Examination Additional Readings:*Section 3 – Professional Responsibility:*

- Fix (2018), “Starting with Humility: Creating Meaningful Public Engagement”, *Planning West*, p. 575
- Salakoh (2016), “Five Skills for Young Professional Planners”, *Plan North West*, p. 304
- Steil (2018), “When Planning, Politics, Public Interest and Ethics Collide”, *Plan North West*, p. 553



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Edmonton, Alberta

PLANNING IN THE PUBLIC AND PRIVATE SECTOR

PURPOSE

The sixth module concludes the exploration of foundational planning topics by examining both the distinctions and intersections between public and private sector practice. This session provides an opportunity to discuss the types of work performed in each sector, how the sectors interact, and the ethical, interest-based, and professional responsibility questions that define practice in each context.

Through review of different planning roles and discussion of how issues of professional identity, ethics, and responsibility are experienced across sectors, the mentee will develop insight into working effectively with planners in varied contexts, identifying potential career paths, and maintaining professional and ethical standards regardless of the practice setting.

The mentor will share experiences from their own career and those of colleagues across sectors to illustrate the scope of the profession.

Note: Where possible, the session should include a guest perspective from a planner on the “other side of the table” (i.e., a private sector planner joining the discussion facilitated by a public sector mentor) to provide a diverse perspective and enrich the mentee’s understanding of cross-sector collaboration.

OBJECTIVES

1. Explain the differences and intersections between public and private sector planning roles, including their responsibilities, typical projects, and organizational context.
2. Highlight how professional identity and ethical responsibilities are expressed differently across sectors, and how these contextual differences influence day-to-day planning practice.
3. Share personal experiences and lessons from your career that illustrate how planners navigate ethical and professional challenges in both sectors.
4. Facilitate discussion on collaboration and cross-sector understanding, helping the mentee appreciate how planners in different sectors work with each other.
5. Introduce the mentee to additional perspectives by connecting them with colleagues from the other sector, enabling direct discussion of differing approaches and professional context.
6. Support reflection on how these insights inform the mentee's own career interests, ethical decision-making, and professional development planning.

SUGGESTED ACTIVITIES

Mentee Activities:

- Research public and private sector roles in planning, noting the different types of projects, responsibilities, and typical organizational structures.
- Identify how professional identity, ethics, and responsibility are experienced differently across sectors, using examples from your research or personal observations.
- Reflect on potential career paths, considering how your interests, values, and skills align with different sectors.
- Prepare questions for discussion with the mentor and, if attending, a guest planner from the “other side” of planning practice.



Mentor Activities:

- Introduce the mentee to a practitioner from the “other side of the table” where possible, to provide additional perspectives and enrich understanding of sectoral differences.
- Share experiences from your career illustrating the differences and intersections between public and private sector planning roles, responsibilities, and contexts.
- Discuss ethical and professional challenges unique to each sector, and strategies used to navigate them successfully.
- Facilitate discussion on cross-sector collaboration, highlighting how public and private planners work with one another in practice.
- Guide the mentee in considering implications for their own career path, including how their interests, values, and skills best align with public or private sector practice.

CONVERSATION PROMPTS

- What differences have you observed between public and private sector planning roles in terms of responsibilities, ethics, and professional expectations?
- Can you describe a situation where working across sectors required negotiation or collaboration between public and private sector planners?
- How might professional identity influence decision-making, communication, and ethical judgment in different planning contexts?
- What lessons from your career or your colleagues’ experiences illustrate challenges or best practices for navigating sector differences?
- What strategies help navigate sector-specific ethical or professional dilemmas? How might these strategies align across sectors? How might they differ?

RESOURCES**Professional Examination Additional Readings:***Section 1 – Ethics:*

- Hickman and Sturzaker (2021), “Ethical principles in an increasingly diverse planning profession: The potential impact on different types of planners,” *Town Planning Review* 93(3), p. 88
- Loh and Arroyo (2017), “Special ethical considerations for planners in private practice”, *Journal of the American Planning Association* 83(2), p. 44



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Ottawa, Ontario

PROFESSIONAL RESPONSIBILITIES AND CONDUCT

PURPOSE

The seventh module provides an opportunity to focus on the functional competencies that define a professional planner and to situate these competencies within the broader frame of ethical behaviour, the public interest, and professional responsibility.

This session will see the review and discussion of the functional competencies established by the PSB, being knowledge of human settlement patterns; the history and principles of community planning; the influence of government, law, and policy; policy development and application; and emerging trends and issues. Through this session, the mentee will continue to gain appreciation for the historical, cultural, political, and economic forces that shape planning practice in Canada.

The mentee will complete a short research or analytical exercise linked to one or more of the functional competencies to deepen applied learning and connect these topics to contemporary planning issues. The mentor will share experiences from practice where functional competencies were central to the design, justification, or implementation of planning decisions.

Sample topics for research and analysis include:

1. **Human settlement:** Discuss how a pre-development landscape (i.e., river valley, transportation corridor) shaped the evolution of a community or neighborhood.
2. **History and principles of community planning:** Identify a significant policy decision (e.g., limiting density through guiding community-level plans or restrictive covenant) and assess how its legacy persists in the current urban form.
3. **Government, law, and policy:** Map the decision process for a planning approval and note where potential exists for ethical conflicts or challenges to the public interest.
4. **Policy development and application:** Compare two different policy options for responding to a single issue (e.g., incentives for non-market housing vs. inclusionary zoning) and assess tensions and trade-offs present in the options.
5. **Implementation approaches:** Analyze an instance where plan implementation was constrained or enabled by an external factor (e.g., public financing, community opposition, legal risk) and discuss potential remedies.
6. **Contemporary trends and issues:** Select a contemporary issue (e.g., social media misinformation, climate change adaptation, adoption of AI tools) and explore how it could impact the ethical and professional commitments of the planning profession.

OBJECTIVES

1. Support applied learning by reviewing and providing feedback on the mentee's short research or analytical exercise tied to one or more functional competencies.
2. Surface the connection between theory and practice by illustrating how historical, cultural, political, economic, legal, or environmental contexts shaped real planning decisions in the mentor's own work.
3. Reinforce ethical and professional framing by linking functional competencies to matters of public interest, professional responsibility, and responsible decision-making.
4. Model reflective practice by sharing lessons learned (i.e., "what changed my thinking and why") from past projects that illustrate the impact of functional competency gaps or strengths.
5. Frame the analytical exercise and discussion in a way that could be translated into logbook entries or Professional Examination preparation.

SUGGESTED ACTIVITIES**Mentee Activities:**

- Complete a short research or analytical exercise linked to one or more of the functional competencies, drawing inspiration from a case study provided by the mentor, professional project experience, or a current event in the news. It is recommended that this be submitted to the mentor ahead of the meeting.
- Present key insights from the exercise, focusing on how history, economics, culture, policy, or governance shaped planning outcomes.
- Reflect on how the exercise connects to ethical responsibility, the public interest, and professional planning practice.

Mentor Activities:

- Provide feedback on the mentee's analytical exercises, discussing where they encountered challenges and ambiguities and where they uncovered new insights.
- Share examples from professional practice where the historical, economic, political, cultural or environmental context shaped a planning decision or constrained its implementation.

CONVERSATION PROMPTS

- In what ways did historical, geographic, or cultural context shape a planning decision you observed or were part of?
- How have legacy political, legal, or institutional decisions constrained or enabled a planning process you worked on? How did you navigate this?
- Describe a time you weighed competing policy options or applied policy in practice. What tensions or lessons emerged?
- How have you incorporated environmental, social, economic, or equity considerations to improve planning outcomes in a real case?
- Describe how you supported decision-making or risk management in a planning project, and what you learned about professional responsibility through that experience.

RESOURCES

General:

- PSB Guide for Candidate Members & Mentors (“Functional Competencies”)



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St. John's, Newfoundland

PROFESSIONAL RESPONSIBILITIES AND CONDUCT

PURPOSE

The eighth module turns to the enabling competencies that underpin effective planning practice and complement the foundational themes of ethical behaviour, the public interest, and professional responsibility.

Where Module 7 focused on concepts that comprise the functional competencies, this session examines the less-tangible and practical capabilities that shape a planner's conduct and influence planning outcomes: critical thinking, communication, interpersonal skills, leadership, and ethical judgment.

The mentee will undertake one or more activities that support understanding of the enabling competencies. These activities include:

1. **Review of a micro-scenario:** The mentor provides a two or three sentence scenario (e.g., a fraught council meeting, developer pressure, team conflict). The mentee identifies which enabling competences are most relevant in this context and why, then propose a remedy.
2. **Real-world observation:** The mentee identifies a Council session, open house, or other public-facing event to observe, and records how the enabling competencies were – or were not – demonstrated in practice. As most municipal councils in Canada webcast and archive their meetings, sessions may be attended live or viewed later as recordings.

3. **Empathy-building:** Paired with item (2) real-world observation, the mentee considers how the observed situation appears from the position of a practicing planner, an elected official, and a member of the public to understand how the enabling competencies are experienced from perspectives outside of that of the planner.
4. **Discussion of mentor/mentee experience:** The mentor or mentee provides an instance where enabling competencies were found to be missing or weak, and together discuss the consequences of this disconnect.

The mentor will provide feedback and share examples of how enabling competencies influence team dynamics, project or file management, public and political interaction, and the quality of decision-making throughout the planning process.

OBJECTIVES

1. Guide the mentee in identifying which enabling competencies are most relevant in planning scenarios and professional contexts.
2. Share examples of real-world situations where enabling competencies were either successfully applied or lacking, and explore the resulting impact on outcomes.
3. Provide constructive feedback on the mentee's analysis of micro-scenarios or real-world observations, connecting these to professional responsibility, public interest, and ethical practice.
4. Facilitate discussion that helps the mentee recognize the influence of enabling competencies on team dynamics, project management, public engagement, and decision-making quality.

SUGGESTED ACTIVITIES**Mentee Activities:**

- Analyze a jointly-developed micro-scenario by identifying relevant enabling competencies and proposing a reasoned course of action.
- Conduct a real-world observation (e.g., council meeting, open house, hearing) and document where and how enabling competencies were present or absent.
- Undertake an empathy-building reflection by articulating how the same observed situation might be experienced from the perspective of a planner, an elected official, and a member of the public.

Mentor Activities:

- Co-create or provide a micro-scenario to prompt structured analysis by the mentee.
- Share a real example where enabling competencies were weak or absent and facilitate a discussion on the consequences.
- Provide feedback on the mentee's scenario analysis, observation notes, or reflective exercise.
- Surface connections between enabling competencies and ethical behaviour, public interest, and professional responsibility through professional experience and commentary.

CONVERSATION PROMPTS

- Which enabling competencies were most critical in the micro-scenario we discussed, and why?
- Reflecting on your real-world observation, where were enabling competencies applied effectively, and where were they missing? What was the impact?
- How might a scenario be perceived differently by a planner, an elected official, or a member of the public?
- Can you think of a situation from your own practice where a missing enabling competency influenced the outcome? What would you do differently now?
- How do enabling competencies interact with ethics, public interest, and professional responsibility in your work?
- What strategies could you adopt to strengthen enabling competencies in your own planning practice?

RESOURCES**General:**

- PSB Guide for Candidate Members & Mentors (“Enabling Competencies”)



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Fredericton, New Brunswick

REFLECTION I: LEARNING FROM SCENARIOS

PURPOSE

The ninth module provides an opportunity for the mentee to gain practical insight into foundational topics in planning through applied learning and exploration of common scenarios encountered in planning practice.

This module complements Module 11, where the mentee will engage in experiential learning and reflection and consider their own experiences to deepen their understanding of practice challenges and professional growth.

Through discussion of multiple-choice scenarios found in the Professional Examination Study Guide and examples provided in the Resources section, the mentee will gain appreciation for the types of situations likely to arise both on the exam and in professional practice. This discussion will enable the mentee to reflect on practice challenges, ethical dilemmas, and decision-making strategies while also preparing to sit the Professional Examination.

The discussion will allow the mentor to share personal experiences and lessons learned, illustrate how foundational topics are applied in practice, and guide the mentee in reflecting on complex scenarios, including “wicked problems” that may involve competing interests, uncertainty, or trade-offs.

OBJECTIVES

1. Demonstrate the application of foundational planning concepts through scenario examples connected to the **Professional Examination Study Guide** and case studies.
2. Highlight lessons learned and practical insights from professional experience to contextualize scenarios.
3. Guide mentee reflection on ethical dilemmas, decision-making, and problem-solving strategies.
4. Illustrate approaches to complex or “wicked” problems, including managing ambiguity, competing interests, and tensions.
5. Encourage the mentee to become acquainted with the scenario structure used in the **Professional Examination Study Guide**.
6. Support development of adaptive thinking and professional judgment by discussing alternative approaches and outcomes.

SUGGESTED ACTIVITIES**Mentee Activities:**

- Review and discuss scenarios included in the **Professional Examination Study Guide** and/or provided case studies (listed in the **Professional Examination Additional Readings** section under ‘Resources’).
- Reflect on how these scenarios relate to professional challenges, ethical considerations, and decision-making processes in real-world practice.

Mentor Activities:

- Illustrate how the scenarios discussed relate to your own professional experience.
- Share project insights and lessons learned to contextualize scenarios.
- Guide mentee reflection on practice challenges, highlighting strategies for navigating complex or ambiguous situations.
- Discuss examples of “wicked problems” and how to approach them with adaptive problem-solving and professional judgment.

CONVERSATION PROMPTS

- Which scenario from the **Professional Examination Study Guide** resonated most with your professional experience and/or perspective, and why?
- What lessons have you learned from real-world planning challenges that connect to these scenarios?
- What strategies can help manage ambiguity or conflicting priorities in complex planning scenarios?

RESOURCES

General:

- American Planners Association (2025), *Ethics Cases of the Year* [See Supplemental]
- Peters, B. Guy (2017), “What is so wicked about wicked problems? A conceptual analysis and a research program”, *Policy and Society* 36(3) [See Supplemental]
- Professional Examination Study Guide (“Practice Questions”)

**Professional Examination
Additional Readings:***Section 1 – Ethics:*

- Dear Dilemma, *Ontario Planning Journal* (“letters to the editor”), 9-22



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Calgary, Alberta

SPECIAL TOPICS IN PLANNING PRACTICE

PURPOSE

The tenth module explores how foundational planning topics intersect with contemporary social, cultural, economic, and environmental factors. The mentee will gain appreciation for how these broader factors – such as Truth, Reconciliation, and Indigeneity; climate change (both adaptation and mitigation); equity, diversity, and inclusion (EDI); and artificial intelligence (AI) – interact with planning ethics, public interest, and professional responsibilities.

The discussion will highlight how these topics evolve over time and emphasize the importance of adaptability and continual learning in supporting the public interest. This will allow the mentor to share practical lessons from projects where one or more of these special topics were a key factor, demonstrating how planners respond to evolving challenges and incorporate these considerations into professional practice.

OBJECTIVES

1. Illustrate how special topics influence planning practice, using concrete examples from professional experience.
2. Connect the foundational competencies (planning ethics, public interest, and professional responsibilities) to contemporary social, cultural, environmental, and technological issues.
3. Highlight tensions encountered when applying planning principles to special topics, and discuss strategies to navigate them.
4. Encourage reflection and discussion on how the mentee could incorporate adaptability and continuous learning into professional practice.
5. Demonstrate the evolving nature of planning challenges, emphasizing the importance of staying informed and responsive to evolving factors and issues.

SUGGESTED ACTIVITIES

Mentee Activities:

- Select an area of interest (e.g., climate change, Truth & Reconciliation, EDI, AI) and explore how the planning practice shapes and is shaped by it.
- Discuss the tensions that exist in professional practice with regard to these topics (e.g., urban development patterns vs. climate resilience, relationship-building with Indigenous communities vs. the often-transactional nature of public engagement).
- Reflect on implications for ethics, public interest, and professional responsibilities in light of the selected topic.

Mentor Activities:

- Share practical lessons from projects where the selected topic proved (or did not prove) a key factor in planning or implementation. If not, why?
- Discuss how the importance and framing of the special topic has evolved over time and the resulting implications for professional practice.
- Highlight the role of adaptability, continuous learning, and ongoing professional development in responding effectively to social, cultural, environmental, or technological challenges.

CONVERSATION PROMPTS

- Which influencing factors in planning interest you most (e.g., climate change, EDI, Truth & Reconciliation, AI)?
- How have these factors influenced planning projects or processes you've observed or participated in?
- What tensions or trade-offs have you seen or do you anticipate when these issues intersect with urban development, policy, or governance?
- How can planners adapt the profession to evolving social, cultural, environmental, or technological factors while maintaining their ethical and professional responsibilities?
- What lessons from past projects illustrate effective responses to these topics?

RESOURCES**General:**

- American Planners Association (APA), *Annual Trends Report* [See Supplemental]

PSB Additional Readings:*Section 4 – Emerging Issues:*

- Barr (2019), “Through an Equity Lens: Planning for Healthy and Equitable Communities,” *Planning West*, p. 689
- CIP/ICU, “Policy on Climate Change Planning”, p. 734
- CIP/ICU, “Policy on Planning Practice and Reconciliation”, p. 608
- Garcia, Garfinkel-Castro and Pfeiffer, “Introduction”, *APA Planning with Diverse Communities PAS Report 593*, p. 698
- Kyriazis and Callihoo (2018), “Legal Implications of Climate Change”, *Plan Canada*, p. 760
- Patterson (2019), “A Brief Overview of the Duty to Consult”, *Planning West*, p. 606
- Schweitzer (2017), “Introduction: Planning Ethics in the 21st Century”, *Journal of the American Planning Association* 83(2), p. 40
- Lauria and Long (2017), “Planning Experience and Planners’ Ethics”, *Journal of the American Planning Association* 83(2), p. 56



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Vancouver, British Columbia

REFLECTION II: LEARNING FROM EXPERIENCE

PURPOSE

The eleventh module provides the mentee with an opportunity to build upon the mentorship journey to date through experiential learning and discussion of their professional background in the context of ethics, public interest, and professional responsibility. This module complements Module 9, where the mentee engaged in scenario-based learning to apply foundational topics and develop critical thinking in situations similar to those found on the **Professional Examination**.

Through review of real project experiences, the mentee will gain appreciation for common professional obstacles, opportunities for resilience, and strategies for navigating complex planning challenges. The discussion also enables the mentee to revisit topics of interest or areas identified for improvement from earlier in the mentorship journey.

The discussion will allow the mentor to provide feedback on experiential examples, highlight observed areas of tension related to ethics, public interest, and professional responsibility, and guide the mentee in integrating these reflections into their professional identity and ongoing practice.

OBJECTIVES

1. Illustrate how reflection on real-world planning experiences deepens understanding of ethical practice, public interest, and professional responsibility.
2. Connect lessons learned from past projects to the functional and enabling competencies expected of a professional planner.
3. Highlight tensions and challenges encountered in practice, and discuss strategies for maintaining professionalism and resilience when navigating them.
4. Demonstrate the importance of ongoing reflection and adaptability in strengthening professional competence and preparing for lifelong learning in planning practice.

SUGGESTED ACTIVITIES**Mentee Activities:**

- Approach the role of reflective practitioner through journaling or discussion.
- Present a recent project summary or logbook entry to the mentor.
- Consider how the experience has shaped professional identity, ethical practice, and understanding of the public interest.
- Reflect on competencies (both functional and enabling) applied during the project.

Mentor Activities:

- Provide feedback on the mentee's provided experiential example.
- Highlight areas of tension related to ethics, public interest, or professionalism.
- Discuss strategies for navigating challenges – both common and complex – and fostering resilience in practice.
- Support reflection as a standard part of the mentee's professional development.

CONVERSATION PROMPTS

- How has your recent project experience helped to shape your professional identity?
- Which competencies (enabling and/or functional) were most relevant in addressing project challenges?
- Where did you encounter tensions between ethics, public interest, and professionalism, and how did you navigate them?
- What strategies helped you manage competing interests or complex decision-making requirements?
- Looking back, what in the project would you approach differently and why?

RESOURCES**General:**

- University of Cambridge Libraries (n.d.), [“Reflective Practice Toolkit”](#)



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Montréal, Québec

CAREER PLANNING AND PROFESSIONAL DEVELOPMENT

PURPOSE

The twelfth and final planned module provides an opportunity for the mentee to reflect on the mentorship journey, consolidate key learnings, and assess remaining steps toward sitting the **Professional Examination**. The mentee will gain appreciation of how their skills, experiences, and professional identity have developed over the mentorship year and begin to identify goals and strategies for continued growth post-certification.

The discussion will allow the mentor to review the mentee's progress and achievements, provide targeted guidance on remaining exam preparation, and support the mentee in drafting a professional learning plan for the next three years. The mentor will also encourage ongoing informal mentorship and networking to sustain the mentee's professional development beyond the formal mentorship period.

Note: This is the conclusion of the formal mentoring journey. However, further mentorship may be required in order for the mentee to successfully prepare for the **Professional Examination**. It is left to the mentor and mentee to determine if additional support is needed to do so.

OBJECTIVES

1. Reflect on the mentee's progress over the mentorship journey, recognizing achievements, growth, and areas of ongoing development.
2. Provide guidance on final exam preparation, revisiting areas of strength and areas needing additional focus, and linking back to strategies first discussed in Module 2.
3. Support the mentee in developing a three-year professional learning plan, helping them set realistic goals and identify opportunities for skill-building, networking, and professional experience.
4. Encourage ongoing mentorship and networking, highlighting ways to sustain professional development and maintain connections within the planning community.
5. Offer feedback on mentee reflections, helping them consolidate lessons learned from the journey and translate them into actionable steps for continued growth.

SUGGESTED ACTIVITIES**Mentee Activities:**

- Draft a three-year professional learning and development plan, outlining priorities for skill-building, professional experience, and career milestones. This offers an opportunity to build clear connections to the fulfillment of annual continuing professional learning (CPL) credits required by PTIAs.
- Write a mentorship reflection summarizing key learnings, challenges, and accomplishments from the mentorship year. This offers an opportunity to meaningfully connect reflections gleaned from the mentorship journey into the mentee's logbook.
- Set post-certification goals, including strategies for continued competency growth, networking, engagement in PTIA activities, and/or more general professional development.

Mentor Activities:

- Reflect on the mentee's progress and key achievements through the mentorship journey.
- Provide guidance on final steps to prepare for the PSB exam, including revisiting areas identified as needing further attention (at minimum, a refresher on **Module 2: Exam Fundamentals**).
- Discuss potential ongoing or informal mentorship opportunities to support continued exam preparation or professional growth.
- Offer advice and resources for longer-term career development, networking, and maintaining professional competencies post-certification.

CONVERSATION PROMPTS

- "What were your key learnings from this mentorship year and how have they shaped your understanding of planning practice?"
- How prepared do you feel to sit the Professional Examination and which areas might still require targeted attention?
- What are your post-certification goals for the next three years, and how will you prioritize skill development and professional experience?
- How can mentorship, networking, or professional engagement continue to support your growth and career progression?
- Looking back, what aspects of this mentorship were most valuable and what might you carry forward into future learning or potential mentorship opportunities (with the mentee as mentor)?

RESOURCES**General:**

- If required, consult Resources under **Module 2: Exam Fundamentals**.



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Banff, Alberta

RESSOURCES



Northwest Territories

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I: TEXT

The following resources provided by the CIP and PSB should be used to prepare for the Professional Examination:

- CIP Member Code of Ethics and Professional Conduct
- Ethical Foundations For Professional Planners Course
- Guide for Candidate Members and Mentors
- Mentorship Agreement and Record of Mentorship
- Professional Examination Additional Readings, and the
- Professional Examination Study Guide

Note 1: Appendix 3 of the **Professional Examination Study Guide** provides a comprehensive list of additional readings organized by topic area and aligned with the companion **Additional Readings** resource. This Handbook includes a selection of these readings within most modules. If further reading or deeper study is required, candidates and mentors should consult **Appendix 3** of the **Study Guide** for direction.

Note 2: Items marked with an asterisk (*) are bundled in an **Mentorship Handbook Supplemental** package under separate cover.

MODULE 1

Title: Orientation

General:

- PSB Mentorship Record
- Mentorship Guide for Candidate Members and Mentors
- Mentorship Agreement
- [Competency Assessment Template](#) (refer to the end of this Appendix)

MODULE 2

Title: Exam Fundamentals

General:

- Professional Examination Study Guide (“Introduction”, “The Exam Process”, “Exam Preparation”, “Examination Time”)
- [PSB Website – Professional Examination](#)

MODULE 3

Title: Planning and Ethics

General:

- CIP Member Code of Professional Conduct and Statement of Values
- PSB Ethical Foundations for Professional Planners Course (“Module 2: Professional Ethics”)
- Professional Examination Study Guide (“Ethics”)

**Professional Examination
Additional Readings:**

Section 1 – Ethics:

- Schweitzer (2017), “Introduction: Planning Ethics in the 21st Century”, *Journal of the American Planning Association* 83(2), p. 40
- Lauria and Long (2017), “Planning Experience and Planners’ Ethics”, *Journal of the American Planning Association* 83(2), p. 56

MODULE 4

Title: Planning and the Public Interest

General:

- CIP Member Code of Professional Conduct and Statement of Values
- PSB Ethical Foundations for Professional Planners Course (“Module 3: Obligation to Uphold the Public Interest”)
- Professional Examination Study Guide (“Public Interest”)

**Professional Examination
Additional Readings:**

Section 2 – Public Interest:

- Grant (2005), “Rethinking the Public Interest as Planning Concept”, *Plan Canada*, p. 130
- Dadashpoor and Sheydayi (2021), “Defining Public Interest in Planning”, *Journal of Planning Literature* 36(4), p. 142
- Ontario Municipal Board, Case No(s): PL140240/PL140317, 822403 Ontario Inc. v. Oakville (Town)

MODULE 5

Title: Professional Responsibilities and Conduct

General:

- CIP Member Code of Professional Conduct and Statement of Values
- PSB Ethical Foundations for Professional Planners Course (“Module 4: Professional Responsibility – Competence and Independence”, “Module 5: Professional Responsibility – Integrity and Professionalism”)
- Professional Examination Study Guide (“Professional Responsibility”)

**Professional Examination
Additional Readings:**

Section 3 – Professional Responsibility

- Fix (2018), “Starting with Humility: Creating Meaningful Public Engagement”, *Planning West*, p. 575
- Salakoh (2016), “Five Skills for Young Professional Planners”, *Plan North West*, p. 304
- Steil (2018), “When Planning, Politics, Public Interest and Ethics Collide”, *Plan North West*, p. 553

MODULE 6

Title: Planning in the Public and Private Sector

**Professional Examination
Additional Readings:**

Section 1 – Ethics

- Hickman and Sturzaker (2021), “Ethical principles in an increasingly diverse planning profession: The potential impact on different types of planners”, *Town Planning Review* 93(3), p. 88
- Loh and Arroyo (2017), “Special ethical considerations for planners in private practice”, *Journal of the American Planning Association* 83(2), p. 44

MODULE 7

Title: Functional Competencies

General:

- PSB Guide for Candidate Members & Mentors (“Functional Competencies”)

MODULE 8

Title: Enabling Competencies

General:

- PSB Guide for Candidate Members & Mentors (“Enabling Competencies”)

MODULE 9

Title: Reflection I:
Learning from Scenarios

General:

- American Planners Association (2025), *Ethics Cases of the Year**
- Peters, B. Guy (2017), “What is so wicked about wicked problems? A conceptual analysis and a research program”, *Policy and Society* 36(3)*
- Professional Examination Study Guide (“Practice Questions”)

**Professional Examination
Additional Readings:**

Section 1 – Ethics

- Dear Dilemma, *Ontario Planning Journal* (“letter to the editor” format), 9-22

MODULE IO

Title: Special Topics in Planning Practice

General:

- American Planners Association (2025), *Annual Trends Report**

**Professional Examination
Additional Readings:**

Section 4 – Emerging Issues:

- Barr (2019), “Through an Equity Lens: Planning for Healthy and Equitable Communities,” *Planning West*, p. 689
- CIP/ICU, “Policy on Climate Change Planning”, p. 734
- CIP/ICU, “Policy on Planning Practice and Reconciliation”, p. 608
- Garcia, Garfinkel-Castro and Pfeiffer, “Introduction”, *APA Planning with Diverse Communities PAS Report 593*, p. 698
- Kyriazis and Callihoo (2018), “Legal Implications of Climate Change”, *Plan Canada*, p. 760

- Patterson (2019), “A Brief Overview of the Duty to Consult”, *Planning West*, p. 606
- Schweitzer (2017), “Introduction: Planning Ethics in the 21st Century”, *Journal of the American Planning Association* 83(2), p. 40
- Lauria and Long (2017), “Planning Experience and Planners’ Ethics”, *Journal of the American Planning Association* 83(2), p. 56

MODULE II

Title: Reflection II:
Learning from Experience

General:

- University of Cambridge Libraries (n.d.), “[Reflective Practice Toolkit](#)”

II: COMPETENCY SELF-ASSESSMENT

Instructions: For each enabling and functional competency, rate your current level of comfort or proficiency and provide a brief note on areas you'd like to develop or focus on during your mentorship year.

Rating Scale:

1: Needs significant development

2: Developing, with some experience

3: Competent and confident

4: Highly proficient and/or experienced

Enabling Competency	Rating (1-4)	Notes
Critical thinking and problem-solving		
Communication skills		
Interpersonal skills, collaboration, and teamwork		
Professional judgement, ethics, and decision-making		
Leadership and self-management		
Adaptability and continuous learning		
Functional Competency	Rating (1-4)	Notes
Knowledge of human settlement and community planning		
Plan and policy development, implementation, and evaluation		
Understanding of regulatory frameworks and legislation		
Environmental, social, and economic considerations in planning		
Application of research, analysis, and evidence to planning decisions		