

## ***Membership Manual***

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A MANUAL  
FOR THE GUIDANCE OF  
THE NATIONAL MEMBERSHIP COMMITTEE  
AND  
AFFILIATE MEMBERSHIP COMMITTEES  
***VOLUME 2 - Applications for Membership***

*(Updated by the National / Affiliate Membership Committee  
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## **2.1. CLASSES OF MEMBERSHIP**

**2.1.1** CIP By-law No. 1 (1986) establishes the various classes of membership, and the requirements for election to each.

**2.1.2** SCHEDULE "A" of CIP, By-law No. 1 (1986), as amended, contains the complete qualifications for each membership category. In summary, the three basic requirements are education, experience, examination or portfolio.

**2.1.3** No commitment to membership admission shall be made by the National Membership Committee or any Affiliate Membership Committee until all requirements for the respective class of membership have been completely fulfilled.

## **2.2. AFFILIATES**

**2.2.1** By-law No. 1(1986) gives each Affiliate the responsibility for membership matters within the jurisdiction of that affiliate. Membership matters are the responsibility of National Council for applicants not residing in Canada. Therefore, when consulting this Manual, the reader may substitute the words affiliate/national according to the context.

## **2.3 NATIONAL MEMBERSHIP COMMITTEE**

**2.3.1** Clause 12.2 of CIP By-law No. 1 (1986) establishes Committee of the Institute to be known, as the National Membership Committee comprised of Fellows or Members of the Institute.

**2.3.2** Under current practice, the National Membership Committee holds one "in-person" committee meeting per year, as well as from time to time hold teleconferences or additional meetings as may be necessary. *It reviews applications for membership by candidates residing outside Canada. Since these are not numerous, the Committee is formed on an ad hoc basis to deal with each application. For example, members of an Affiliate Membership Committee may be requested to act on a National Membership Committee to review an application or conduct an Oral Examination. In that case, they use the National rather than Affiliate standards.*

### **Composition**

**2.3.3** Council shall appoint the Chair of the Committee, and the term of office shall be 3 years; maximum two consecutive terms, 1 year, renewable (Affiliate appointments) 1 year, renewable; ACUPP Representative 1 year, renewal (appointed by ACUPP) and CIP Council Liaison for a 1 year,

renewable term (appointed by CIP President; ratified by CIP Council)

### **Functions**

- 2.3.4** The following functions are normally delegated to the National Membership Committee:
- a) *Upholds the maintenance and proper application of the Institute's national and international membership standards.*
  - b) *Revises/interprets CIP's Membership Manual as needed to ensure clarity and consistency in their application.*
  - c) *Facilitates CIP/Affiliate cooperation on the development and maintenance of a national online membership registry (database).*
  - d) *Facilitates CIP/Affiliate cooperation on the recognition of university planning programs.*
  - e) *Addresses matters relating to member retention and recruitment, working collaboratively and in a complementary fashion with Affiliates.*
  - f) *Advises CIP Council on matters regarding reciprocity and labour mobility affecting CIP's membership and the planning profession in Canada.*
  - g) *Addresses issues relating to the maintenance and application of the Institute's National Code of Practice.*
  - h) *Facilitates CIP/Affiliate cooperation on the development and operation of a national mentorship program.*
  - i) *Works collaboratively, in concert with CIP Council, other CIP committees, CIP Office, and others as may be applicable in the development and planning the delivery of activities, programs, products and services identified in the committee's Action Plans, which relate to the current CIP Strategic Plan.*

**2.3.5** The National Membership Committee may consult with Affiliate Membership Committees on any matter and may make any inquiry before voting on an application.

**2.3.6** All recommendations made by the National Membership Committee require ratification by Council, except for those matters delegated to the committee.

## **Annual meeting with Affiliate Membership Committee Chairs**

**2.3.7** A meeting of the National Membership Committee Chair, Affiliate Membership Committee Chairs and the ACUPP Representative shall be scheduled. Other interested parties, such as university representatives, may be invited according to the circumstances. The agenda may include such matters as the following:

- *Monitor the membership process, discuss problems, exchange experience, and where appropriate recommend to Council amendments to the By-laws or this Manual. These may include such matters as membership standards, administrative procedures, the logbook, the nature of the written examination or Oral Examination, degree recognition, ethics or discipline, or definitions.*
- *For periodic intensive reviews of degree recognition, review recommendations from Affiliates and make recommendations to Council.*
- *Monitor the mechanisms put in place to accurately review foreign work experience.*
- *Monitor reciprocal membership arrangements with the professions of other countries.*
- *Other matters referred to it by Council.*
- *The meeting may raise new matters of its own initiative, for the consideration of Council.*

## **2.4 FOREIGN DEGREES**

### **Reciprocal relations**

**2.4.1** CIP has begun to establish reciprocal relations with the professions of countries from which most applications come. (See the section of the Manual on "Foreign Applications"). In those cases, it is not necessary to evaluate the foreign degree. This section applies to applicants who are not members of professional organizations "recognized" by CIP.

### **Planning degrees and degrees related to Planning**

**2.4.2** CIP does not "recognize" foreign degrees, as it is impossible to administer the recognition of specific planning degrees from foreign countries using the techniques that are used for Canadian planning degrees. Planning as a discipline may be defined differently in other countries. Academic programs may not correspond to the familiar identification of bachelor's, master's or doctor's. The Institute would therefore be involved in monitoring a large volume of planning programs without the advantage of a direct contact with the educational institution. This means that all foreign planning degrees are considered "related to planning", thereby requiring a minimum of four (4) years work experience.

**2.4.3** In assessing a foreign university degree, the following criteria should be applied:

The Applicant must have their credentials verified prior to making application and the certificate from the firm / organization which provided verification must accompany the application. To obtain an assessment of a foreign degree, the applicant should contact:

#### **Canadian Information Centre for International Credentials**

95 St. Clair Avenue West, Suite 1106  
Toronto, Ontario M5S 1T9,  
Telephone (416)962-9725, Fax (416)962-2800  
Web: [www.cicic.ca](http://www.cicic.ca).

or

#### **International Qualifications Assessment Service (IQAS)**

4th Floor, Sterling Place, 9940 106 Street  
Edmonton, AB T5K 2N2  
Telephone (780) 427-2655, Fax (780) 422-9734  
Web: [www.learning.gov.ab.ca/iqas](http://www.learning.gov.ab.ca/iqas)

- *A photocopy of the degree and original transcripts.*
- *The Applicant must submit proof of eligibility for membership in the professional planning organization of the country from which the university degree was granted, or proof of recognition of the degree by the planning profession of that country.*
- *If in a language other than English or French, the documentation should be translated by a professional chosen by the Membership Committee at the applicant's expense.*
- *If in doubt, consult with other sources such as Association of Canadian University Planning Programs, the National Membership Committee or the Canadian Information Centre for International Credentials.*
- *Since there will be no continuous monitoring of foreign planning programs, acceptance of an applicant with a particular foreign planning degree should not be judged as a precedent for subsequent recognition of the same planning degree.*

**2.4.4** Other provisions to assess degrees can be found in SCHEDULE "A" of By-law No.1 (1986), as amended.

## **2.5 RESPONSIBLE PROFESSIONAL PLANNING EXPERIENCE**

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**2.5.1** The Institute affirms that practical experience is as important as education in preparing for professional life. Therefore, Membership Committees should carefully scrutinize the Logbook.

**2.5.2** By-law No.1 (1986), as amended and the Logbook define Responsible Professional Planning Experience and provide the complete procedural details.

**2.5.3** It is recommended that at least one Log Book experience validation form be completed each year. This could be accomplished by enclosing a validation form with the annual invoice for fees for each Provisional member.

**2.5.4** The meaning of planning experience for qualification of membership is taken to include teaching experience in planning in a post-secondary institution.

**2.5.5** It should be noted that only one supervising Member is required and this person must be a full Member of CIP, a Fellow (not a Provisional member) or a Member certified by the American Institute of Certified Planners (AICP) or a Member certified by the Royal Town Planning Institute (RTPI).

**2.5.6** Work experience gained after the successful completion of the program requirements, but prior to graduation at the bachelor's level may be considered.

**2.5.7** Council shall designate a committee charged with responsibility for reviewing and validating foreign work experience.

## **2.6. EXAMINERS**

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**2.6.1** Affiliates are expected to appoint Affiliate Examiners.

## **2.7 WRITTEN EXAMINATION**

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**2.7.1** The "Written Examination" means the Examination prescribed from time to time by Council.

**2.7.2** The Institute Examination is a four hour written examination aimed at determining the applicant's understanding of the substantive knowledge of planning and the planning process, and of the place which his or her special field of interest (if any) has in the process, and of the methods of implementing plans and programs. It tests whether the candidate has the planning knowledge, theory and skills required by the Institute to become a professional.

The delivery of the examination can be applied as follows:

- a) *the applicant may write the exam in a supervised setting and can prepare by reviewing the reading list of suggested study materials found on CIP's Web site;*
- b) *enrol in the examination preparation course offered through many of the affiliates which provides candidates the opportunity to cover some of the questions in a group setting followed by a time period where the examination question must be submitted for marking;*
- c) *Fulfill the Portfolio options (for candidates who have more than 10 years planning experience);*
- d) *Enrol in the executive practitioners course available for those candidates who have more than 10 years planning experience.*

## **Administration**

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**2.7.3** The procedure for administering the Examination shall be carried out by the respective Affiliate. In no case shall there be less than two readings of each Examination with a minimum of two "pass" marks being the requirement to pass the Examination;

**2.7.4** The Membership recommends that Affiliates use an Examiner from another Affiliate where a third reading is required to produce a decision, or in the event of an appeal;

**2.7.6** The Examination fee shall be set and collected by the Affiliate;

**2.7.7** To ensure confidentiality each Affiliate shall use a coding system to identify an applicant when forwarding the applicant's examination paper to the Examiners for reading;

**2.7.8** Each candidate for the written Examination shall be provided with a copy of the current Institute Examination, including the Preamble, at least one month before the Examination. In forwarding copies of the Examination, it should be pointed out that it is not a specimen, but the actual Examination;

**2.7.9** The examination shall normally be written in Canada. In the case of international members, the examination may be done outside of Canada under the supervision of either an MCIP or AICP (American Institute of Certified Planner) or an RTPI (Royal Town Planning Institute);

**2.7.10.** Should an applicant fail the written Examination, the Examination may be re-written no sooner than 6 months after the date of failing and must be done no later than 12 months after completion of the course;

**2.7.11** The outcome of the Examination shall be recorded on the membership file (pass/fail/ comments). If a failure, the applicant shall be given reasons;

**2.7.12** The Examiners will be paid a fee as set from time to time by National Council or the Affiliate for each examination read;

**2.7.13** The Examination may be taken in English or French.

## **2.8 GUIDELINES FOR PORTFOLIO**

**2.8.1** The purpose of these guidelines is to establish a framework for the portfolio route to full membership that will ensure a national standard and consistency of application in Canada;

### **Equivalent in rigour to written exam**

**2.8.2** A candidate may complete either the written examination or submit a portfolio as part of fulfilling the requirements for full membership. The requirements for education and experience would still be applicable. Both routes, the written examination and the portfolio, are equivalent in rigour and the administration of these routes will be such to ensure equivalency. The procedure for administering the portfolio including the setting and collection of a fee shall be carried out by the respective Affiliate;

**2.8.3** The purpose of the portfolio, comparable to the written examination, is to assess that candidates have the planning knowledge and skills required by the Institute. It provides a base for evaluating

knowledge of content (subject matter) and process (application of subject matter) of planning;

**2.8.4** In order to submit a portfolio, a candidate should have a substantial amount of professional experience in planning to ensure that the candidate has developed a body of work for submission as a portfolio;

### **Contents of the portfolio**

**2.8.5** A portfolio shall consist of personal publications (i.e. relevant professional output). Authorship of any publication may be sole or shared. In the case of jointly authored publications, the candidate shall identify in the covering document those portions for which the candidate was solely responsible as well as those portions where responsibility was shared. In the latter case, the candidate shall clearly identify the extent of the candidate's participation and responsibility relative to the other contributors;

**2.8.6** The candidate shall submit a covering document with the portfolio, which shall clearly explain how the candidate considers that the items contained within the portfolio, address the three areas covered by the written examination:

- *an understanding of the comprehensive planning process and of inter-relationships among disciplines contributing to the process and among various kinds of issues that impinge on planning problems;*
- *an understanding of planning theories;*
- *An understanding of how policies and plans are formulated; and*
- *A grasp of how policies and plans are implemented.*

**2.8.7** The covering document must show both practical and theoretical knowledge, and ability to conceptualize and think critically using the submitted works in the portfolio to demonstrate this. The covering document must also provide some evaluation from the candidate's perspective of the work experience contained in the portfolio submission;

**2.8.8** If a candidate's work experience does not provide the candidate with an adequate portfolio of work to address the areas noted above, then the candidate should sit the written examination;

### **Reading of the portfolio**

**2.8.9** The portfolio shall be read by a minimum of two examiners of the Institute. Two examiners must

record a 'pass' in order for the candidate to have successfully completed this requirement for membership. For an examiner to award the outcome of 'pass' the candidate's covering document and portfolio must satisfy the three areas covered by the written examination. If the portfolio is judged to be a 'fail' the candidate shall be given reasons and guidance for subsequent resubmission; in the event of a tie, a third examination could be sought – (refer to procedures followed by the written exam).

**2.8.10** In cases where material from unacknowledged sources is presented as being the candidate's own material the entire portfolio shall be disqualified;

**2.8.11** If the examiners determine that one of the areas covered by the examination questions is not adequately fulfilled through the portfolio, the provisional member may write the relevant question of the written examination;

**2.8.12** A candidate may resubmit a portfolio at any time;

**2.8.13.** An Affiliate may determine that a candidate's portfolio can be supplemented by an Oral Examination. Because the portfolio is equivalent to the written examination, this examination is not a substitute for a well-prepared portfolio with a cogent, well-structured covering document. In addition, this option is not a substitute for the Oral Examination testing ethics and professionalism required under Section 4.1 of Schedule A, By-law No. 1, as amended;

**2.8.14** The appeal provisions contained in Section 6, Schedule A, By-law No. 1, as amended, are applicable to the portfolio.

## **2.9 ORAL EXAMINATION**

**2.9.1** The Oral Examination normally lasts 30 to 60 minutes and is aimed at determining the applicant's understanding of ethics and professionalism. It also provides an opportunity for the candidate to ask questions, and for a discussion of the Institute.

### **Administration**

**2.9.2** The Affiliate Membership Committee shall administer the Oral Examination as an integral part of the membership procedure;

**2.9.3** The applicant shall be provided with a copy of the first page of the Oral Examination outline at

least a month in advance to allow adequate preparation. **The applicant shall not be provided with the sample questions;**

**2.9.4** The National Membership Committee recommends that the Affiliates use three Examiners so that there is a majority decision. A minimum of two required. Examiners must be Members or Fellows;

**2.9.5** The Examiners shall focus on ethics and professional practice;

**2.9.6** The Chair shall review the candidate's membership file in advance, and supplementary questions should be asked according to the circumstances of the candidate's education and experience. For example, candidates with less than two years experience in Canada are probed in their understanding of the Canadian planning system;

**2.9.7** The results of the Oral Examination shall be recorded on the membership file (pass/fail/ comments). If a failure the applicant shall be given reasons;

**2.9.8** The fee shall be set and collected by the Affiliate, which will pay the Examiners an appropriate fee;

**2.9.9** Affiliate Membership Committees may, at their discretion, allow candidates in remote locations to be interviewed by telephone with appropriate supervisory safeguards;

**2.9.10** The Examination may only take place outside Canada under exceptional circumstances and must always be conducted by Members with National Membership Committee or Affiliate Membership Committee experience;

**2.9.11** In the event of a failure, the applicant may apply to re-take the Oral Examination;

**2.9.12** From time to time CIP may appoint Examiners for applications under its jurisdiction. Affiliate Examiners would normally be asked to act "as National Examiners", since the Oral Examination is normally conducted in Canada, and they would implement the National standard;

**2.9.13** The Examination shall be conducted in English or French, whichever is the candidate's language. If there are insufficient Examiners able to work in the French language, additional ones may be temporarily appointed for this purpose.

## **2.10 APPLICATIONS FOR MEMBERSHIP**

**2.10.1** Applications, on a form prescribed for that purpose, shall be made to the Affiliate or to CIP for international applications.

**2.10.2** The application shall be accompanied by such application fee as may be prescribed from time to time.

## **2.11 ADMINISTRATIVE PROCESS FOR ADMITTING MEMBERS TO CIP**

### ***Step 1 - Application***

**2.11.1** Applicant requests application forms.

**2.11.2** Applicant submits completed forms together with application fee.

**2.11.3** Affiliate verifies that all relevant forms are properly completed (e.g. that any validation of experience forms are signed or counter-signed by a full Member of CIP or a full Member of AICP (American Institute of Certified Planners) or a full Member of RPTI (Royal Town Planning Institute) and issues letter of acknowledgement and receipt for fee (or requests additional information).

**2.11.4** For applicants holding foreign work experience the CIP Office will assume responsibility for processing the applications. A number of members will be identified and charged with undertaking the review and validation of foreign work experience for both out of country applicants and for those applicants who have recently immigrated to Canada. An honorarium (to be determined) by CIP will be provided to the reviewing to cover out of pocket expenses and the time spent on validating the file.

**2.11.5** Applications must be made to the Affiliate of residence or to CIP for non-residents.

### ***Step 2 - Committee Review***

**2.11.6** application for Student member: Affiliate Membership Committee verifies that applicant is enrolled in a Canadian planning degree program recognized by CIP

**2.11.7** application for Provisional membership: Affiliate Membership Committee verifies the applicant's academic training, that if the applicant has no recognized planning degree he or she is engaged in a job in the planning field. The Affiliate Membership Committee shall meet the candidate to clarify the process, establish collegial contacts, and discuss the meaning of professionalism.

**2.11.8** application for full Membership: Affiliate Membership Committee verifies that applicant has acquired the necessary experience and education; and that the applicant is a Provisional member and has successfully completed the written examination and the Oral Examination.

**2.11.9** Affiliate Membership Committee determines if further information or clarification is required concerning an application and notifies the applicant.

**2.11.10** If the applicant is to write the examination: the Affiliate Membership Committee notifies the applicant of this and of the required examination fee, and arranges a time, place and "supervisor" for the examination after payment of the fee has been received.

**2.11.11** After the examination is written, the Affiliate Membership Committee forwards it (with the applicant's name removed) to the appropriate Examiners.

**2.11.12** The Examiners return the examination with their comments/evaluation to the Affiliate Membership Committee, which then arranges for each Examiner to be paid for the evaluation, and records the results on file (pass/fail, comments).

**2.11.13** Affiliate Membership Committee notifies the applicant of the required examination fee and arranges a time and place for the oral examination after receipt of fee.

**2.11.14** The Affiliate Membership Committee administers the Oral Examination with the applicant and records the results on file (pass/fail, comments).

**2.11.15** On the basis of the written examination, if any, and the Oral Examination, the Affiliate Membership Committee recommends to the Affiliate Council for or against granting membership to the applicant, with reasons or if delegated that responsibility, the Affiliate Membership Committee grants or refuses membership itself.

**2.11.16** The CIP By-law requires a two-step process, i.e. election to Provisional, then full Member, normally with validated experience in between. Where the affiliate wishes to make an exception and "back date" experience pursuant to Section 2.4 of SCHEDULE "A", as a minimum, two separate Council motions are required to comply with the CIP By-law, i.e. one motion for Provisional and one motion for full Member.

### **Step 3 - Notification**

**2.11.17** The Affiliate's decision on the Affiliate Membership Committee's recommendation is conveyed in writing to the applicant with a copy of the notification sent to the CIP office, including the effective date of the membership and for full Members the exact spelling of the name to appear on the certificate of membership.

**2.11.18** The CIP Office prepares and forwards a membership certificate to a new Full Member after receiving notification of the Affiliate's decision to grant membership to the applicant. It is customary to issue a letter of welcome, and to enclose by-laws and other information.

**2.11.19** Affiliate invoices the new member for annual fees unless affiliate agreements provides otherwise.

**2.11.20** For all categories of membership, upon being informed by the Affiliate, CIP Office adds the member to the membership list or records the change in membership status.

## **2.12 GENERAL POLICIES AND MINIMUM REQUIREMENTS**

**2.12.1** It is the Institute's intent that Membership standards and requirements be consistent across Canada, subject only to provincial legislation.

**2.12.2** A university degree, practical experience, and an examination or portfolio is required as a minimum standard for admission.

**2.12.3** In considering the application of a person for Provisional Membership, there are two policies to be considered.

- That an applicant with a recognized degree in planning is not required to have a job in planning, as the degree takes precedence;
- That all other applicants must have a university degree and a job in planning at the time of application, or who has a minimum of 15 years of progressively more responsible Canadian planning experience; holds a senior

position in their organization and/or has made a significant contribution to the planning profession; and has successfully completed all membership requirements in accordance with these By-laws, including the written and oral examinations.

**2.13.4** Applications for membership shall be judged on their merits. Personality, popularity, politics, religion, ethnicity and similar considerations have no place in the membership review process.

## **2.14 TIME LIMITS**

### **Provisional to Full**

**2.14.1** A person who is a Provisional Member shall be required to apply for Member status following completion of the membership requirements and within the applicable time limits or will be stricken from the membership roll but may reapply.

**2.14.2** A Provisional member:

- With a recognized degree shall apply for Member status within 7 years of obtaining Provisional status; or
- With a related or unrelated degree shall apply for Member status within 7 years of obtaining Provisional status.

### **Student to provisional**

**2.14.3** A student may apply to be a Student member while enrolled in a recognized degree program in planning and ceases to hold Student membership one year after cessation of full-time enrolment in the planning program. **Student members shall upgrade to Provisional as soon as they find employment or within 1 year of convocation if not successful in finding planning employment**

### **Informing the member**

**2.14.4** It will be the responsibility of each Affiliate to inform Student and Provisional members when the time limit respecting their class of membership is nearing completion and that action is required if they wish to retain their membership. The CIP Office performs this function for non-resident members.

### **To write the exam**

**2.14.5** An applicant having obtained permission to write the Institute's written examination or Oral Examination should do so within a period of one year. Failure to do so may result in the requirement to seek permission again and the payment of another fee.

## **2.15. FEES**

### **Application Fees**

**2.15.1** Application fees for all categories of membership will be set by the Affiliate and by CIP Council in the case of non-resident applications.

### **Examination Fees**

**2.15.2** The Examination Fees will be set by the Affiliate and by Council for non-residents. Council will set the fee to be paid to National Examiners, and the Affiliates for Affiliate Examiners.

### **Annual Membership Fees**

**2.15.3** Membership fees are collected by the Affiliate organizations, unless provided otherwise. The national portion of the fees are set by Council and each Affiliate is responsible for setting the affiliate portion. All Full and Provisional Members must have the Errors and Omissions Liability Insurance premium added to their fees. Fellows/Retired/Non Practicing Members should also have this premium added to their invoice but that those who are retired may opt out of the program. CIP will need to be advised in writing of those who choose to opt out of the program;

**2.15.4** The Affiliate is to transfer the national portion of the fees and the Errors and Omissions premium to the CIP Office in accordance with the terms of the Affiliate Agreement, unless otherwise provided. The collection of fees from non-resident members is the responsibility of CIP Office.

### **2.15.5 Professional Liability Insurance and Legal Defense Coverage**

In those Affiliates that have voted in favour of participating in the National Professional Liability Insurance and Legal Defense Coverage program, the annual fees for corporate members (excluding students) are subject to an additional fee for year program coverage.

### **Arrears of Membership Fees and Reinstatements**

**2.15.4** In accordance with the provisions contained in each Affiliate Agreement and the By-laws, the Affiliates assume responsibility for the collection of both CIP and Affiliate arrears and reinstatements, making the appropriate transfer to CIP. For CIP, the arrears fee is 10% of the CIP fee. The Affiliate sets its own arrears fee. The CIP Office assumes this responsibility for non-resident members.

**2.15.5** At the designated time a formal reminder notice will be sent to members still in arrears.

**2.15.6** Where a person holding membership in the Institute is in arrears of payment of fees for the then current year as of the date set by the Affiliate/National holding jurisdiction, such person shall cease to be a member providing a second written notice has been sent. Such person may be readmitted to membership upon payment of a reinstatement fee. For CIP this is an amount equal to the annual dues in effect for the year in which such person seeks reinstatement. The person also pays the normal CIP fee for the current year, resulting in a "double fee" for reinstatement. The Affiliates set their own reinstatement fees.

## **2.16. LEAVE OF ABSENCE**

**2.16.1** A member may be granted a leave of absence under circumstances as may from time-to-time be approved by Council or the Affiliate having jurisdiction. The dates of the leave of absence and the rights and responsibilities to be retained by the member during the leave of absence shall be specified in writing, with a copy to CIP Office.

**2.16.2** An individual granted a leave of absence and wishing to retain National services will be required to pay an amount equal to the National fee for Retired Members/Non Practicing Status. If the individual does not wish to retain National services there will be no National fee payable but their name will remain in the roster; CIP Office must be notified accordingly. Affiliates may charge a fee to retain Affiliate Services.

**2.16.3** The time period is to be left to discretion of the Affiliate.

**2.16.4** Members residing in a foreign country and not practicing are handled by CIP Office.

**2.16.5** Hardship cases, not provided for by other policies or By-laws, may be brought to the Affiliate or Council for appropriate action.

**2.16.6** The interpretation of Clause 1.4.3 of SCHEDULE "A" is that Members or Provisional members who return to university do not revert to Student membership; rather, they take a leave of absence. If they intend to practice while at university the leave should not be granted.

## **2.17 TRANSFER OF MEMBERSHIP**

**2.17.1** When a member moves place of residence from one affiliate to another affiliate or becomes a non-resident, the member shall be entitled to a transfer of membership in the equivalent membership category, subject only to provincial legislation. It may be appropriate to require the member to request the transfer in writing or to complete a form, but a lateral transfer within the same membership category should not be subject to a fee. A full Member shall not be subjected to a re-examination of qualifications. If a review of the file reveals bonafide errors in process, these should be reported to CIP and the previous affiliate to determine appropriate action. Student and Provisional members will proceed through the membership process under the by-laws of the new affiliate, paying any fees required.

**2.17.2** For the purpose of fee collection, the place of residence of a member on December 31 of each year shall determine the affiliate association or non-resident status for that member.

**2.17.3** The onus in regard to moving rests with the member first and with the Affiliate second; CIP Office shall be informed.

### **Procedure**

**2.17.4** It is desirable to standardize procedures so that an orderly transfer of membership from one Affiliate to another can be effected. Consequently, the following procedure is recommended:

- *A member may update their address in the National on-line Database which, upon doing so, a notice of change of address will be sent directly to the affiliate of residency (prior to the change) which will in turn provide them the information to transfer the file to a new affiliate.*
- *On taking up residence in another Province, it is incumbent on members to inform the new Affiliate of their transfer and to give the name of the previous Affiliate.*
- *The change in residency is effective on the date of receipt of the notice, subject only to any provincial legislation.*
- *fees are payable to the affiliate that invoices the members prior to transferring their file to the new affiliate. No file transfer can occur until such time the membership fees are paid for the fiscal year.*

- *On receipt of this information, the Affiliate will take any necessary administrative steps with the member and write the CIP Office, which will update the membership list. The Affiliate of previous residence shall forward the member's file to the new Affiliate by registered mail or other secure delivery system.*
- *If a Provisional or Student member, the former Affiliate shall keep a photocopy of the file until they have been notified that the file was received by the new affiliate as backup in the event the file is lost in transit.*

**2.17.5** Files of deceased members, members in arrears by 2 or more years, and similar, shall be retained in accordance with the appropriate provincial legislation.

### **More than one affiliate**

**2.17.6** A member practicing in more than one affiliate may be a member in more than one affiliate, subject to paying each affiliate fee. The national fee and insurance premium is paid through the affiliate of residence only, and the CIP Office will only list the member in that affiliate, unless the member chooses to pay the national fee again through other affiliate(s).

**2.17.7** Members who wish to retain links to former affiliates may subscribe to the newsletter.

## **2.18 APPLICATIONS FROM NON-RESIDENTS**

**2.18.1** With the adoption of By-law amendment No.3, it is now possible to consider applications from:

- *Graduates of CIP recognized planning programs not working in Canada;*
- *Members of professional planning associations in other countries who want membership in CIP; and*
- *Planners from countries where there is no recognized professional planning association, who want to become CIP members.*

**2.18.2** In principle, the membership process is exactly the same for all applicants, but in practice, the Membership Committee must be more careful with foreign applications, since the applicant is generally not working among CIP colleagues and thus many things usually assumed cannot be. Also, since the prestige of CIP membership is often even greater in other countries than at home, the Institute has a duty to ensure its standards have been rigorously met. This applies particularly to applicants who are not resident in Canada. Since the person wishes to become a member of the Canadian Institute, it is necessary through the membership process to ensure that they are sufficiently familiar with Canadian planning to practice here, and that they have reasonable language skills.

Candidates who have less than two years experience in Canada take a special written examination on the Canadian planning system.

**2.18.3** It must be recognized that there will be circumstances in which the Membership Committee will decline to process an application, where adequate supervision and communication are not possible.

### ***CIP – Recognized Degrees***

**2.18.4** For applicants with CIP recognized degrees gaining work experience outside Canada:

#### **Original certified Degree transcripts are required**

- The direct supervision of the work experience by a CIP Member or AICP (American Institute of Certified Planner) or RTPI (Royal Town Planning Institute) is mandatory, with the supervising Member being accountable. The Membership Committee shall discuss the situation by telephone with the supervising Member and the candidate; and

The Oral Examination shall be conducted by Members with Membership Committee experience. In practice, this would probably be done when the applicant is in Canada, with the nearest Affiliate Membership Committee requested to act as National Membership Committee.

### ***Recognized Equivalent Profession***

**2.18.5** Applicants who reside in countries where there is a "recognized equivalent profession" should join the profession in that country first and then apply under this section. Exceptions may be considered if the applicant has a Canadian degree or Canadian experience. For applicants who are Members of "recognized equivalent professions":

- *The Membership Committee will not have regard for education or work experience;*
- *The Membership Committee will obtain a letter from the recognized equivalent profession to prove the person is a member in good standing;*

**2.18.6** Most transfers from the American Institute of Certified Planners or other recognized equivalent professions will have no previous Canadian connection, and so will write the special exam on the Canadian planning system and the Oral Examination.

### ***No recognized equivalent profession***

**2.18.7** In countries where there is no local profession or CIP has not established "recognition" of the profession:

- Candidates must have a "Canadian connection" such as previous residence, citizenship, work experience or education.
- *Applicants with planning degrees are preferred, even though not being CIP recognized degrees means four years experience is required. For others, the Membership Committee may require additional verification, references, or information according to the circumstances, Applicants must have their university degree(s) verified prior to making application and the certificate from the firm / organization which provided verification must accompany the application.*
- *The description of Oral Examination above applies to the written examination as well. Invigilation of the examination may only take place outside Canada with appropriate precautions. Examiners will be used, and normally these applications will fall under the purview of Membership Committee. Candidates should be referred to the special reading list for foreign residents.*

### ***Less than two years professional planning experience in Canada***

**2.18.7** Candidates preparing for the written examination or the Oral Examination who have less than two years approved logbook experience in Canada shall be referred to the special reading list for foreign residents.

**2.18.8** Candidates who have logged less than two years Responsible Professional Planning Experience in Canada shall take a special written examination on the Canadian planning system and shall be questioned on their understanding of the Canadian planning system in the Oral Examination.

**2.18.9** Logbook experience forms that are submitted by non-residents for work experience that took place in Canada shall be referred to the appropriate Affiliate Membership Committee for a recommendation.

## **2.19 PUBLIC ASSOCIATES**

**2.19.1** With the adoption of By-law amendment No.4, a non-membership category of participation of CIP affairs has been created

**2.19.2** This is open to anyone interested in planning, unless they are working as a planner, are former members, or in the opinion of the Membership Committee should or could seek corporate membership.

**2.19.3** The affiliate collects both the affiliate and national fee, as determined by the affiliate agreement, unless provided otherwise.

**2.19.4** Public Associates are not Members, but receive most of the information that members receive and are welcome to participate in Institute affairs on a non-voting basis. It is important in correspondence and publications never to refer to these persons as "members" or "associate members," always as "Public Associates."

## **2.20 HONORARY MEMBERS**

**2.20.1** Honorary Members individuals who the Institute wishes to recognize for their special contribution.

**2.20.2** Any member, affiliate, or Membership Committee may initiate the nomination process to National Council. Honorary Members do not pay an application fee or annual fee.

## **2.21 FELLOWS**

**2.21.1** The designation of FCIP may be granted to a planner who is a Member<sup>1</sup> of the Canadian Institute of Planners and has achieved national excellence and exhibited a breadth of experience in more than one of the following categories; professional practice, teaching and mentoring, research, community service or leadership in the profession of planning.

A candidate for nomination as a Fellow of the Canadian Institute of Planners must exhibit excellence in the profession of planning and have made a significant difference and contributed to planning in Canada. The aspect of a Canadian

influence is important along with breadth of experience, as this honour is bestowed by the national planning organization. While length of practice and contribution is considered, it is not a primary criterion. Rather, the nature and importance of the candidates' contribution to Canadian planning is the prime focus of the Fellows Selection Committee in recommending a planner be made a Fellow of the Canadian Institute of Planners.

**2.21.2** Selection as a Fellow of the Canadian Institute of Planners is the highest Canadian award that can be given to a planner. It is given only to those Members who exhibit the highest professional attainment and exhibit a wide breadth of experience. Such professional attainment and experience must be significant within the Canadian and/or international context of planning.

Any Member of CIP can be nominated providing:

- *A current Member in good standing of CIP that has been a member of CIP or an Affiliate for a minimum of ten years.*
- *They have made an outstanding contribution to the profession that is recognized as being nationally significant by their peers*

The nomination of a candidate for FCIP may be made by:

- *Any Member of CIP in good standing*
- *The President of CIP, on behalf of the Council of CIP*
- *The President of an Affiliate on behalf of the Council of the Affiliate*

The Fellows Selection Committee of CIP, or a member of that Committee, may **not** nominate or support a candidate as a Fellow of the Canadian Institute of Planners.

### **2.21.3 – Categories and Criteria**

The categories and their criteria for selection as a Fellow of the Canadian Institute of Planners set out the areas of excellence that are considered. These categories are not mutually exclusive and the candidates' accomplishment across more than one category is required. The categories are:

- Professional Practice
- Teaching and Mentoring of Planners
- Planning and Community Research
- Community Service and Leadership in the Profession

Criteria for election as a Fellow of the Institute are as set out in detail in *“College of Fellows: Criteria and Procedures for Election as a Fellow”* as adopted (and amended) by CIP Council on the recommendation of the College of Fellows. The current version of this document is presented as Volume 4 of this manual.

#### **2.21.4 SUBMISSIONS FOR NOMINATION**

Requirements and procedures for submissions for nomination of a Member as a Fellow of the Institute are as set out in detail in *“College of Fellows: Criteria and Procedures for Election as a Fellow”* as adopted (and amended) by CIP Council on the recommendation of the College of Fellows. The current version of this document is presented as Volume 4 of this manual.

#### **2.21.5 ELECTION AS A FELLOW**

The election for the honour of becoming a Fellow of the Canadian Institute of Planners is made based on the recommendation of the Fellows Selection Committee. The final election of a Fellow is the responsibility of the Council of the Canadian Institute of Planners.”

#### ***Administration of the College of Fellows***

**2.21.6** The responsibility for the administering the affairs of Fellows shall rest with the College of Fellows which shall be comprised of all Fellows. The goal of the College of Fellows is to strengthen and reinforce the efforts of the Institute in its endeavour to enhance and develop the profession of planning.

**2.21.7** Any Member elected, as a Fellow of the Institute shall sit on the College of Fellows. Fellows shall be expected to perform one or more of the following functions within the affairs of the Institute:

- *act as trustee on the Planning Student Trust Fund*
- *chair relevant committees based on their past experience,*
- *act as "senior representatives" of the Institute at public functions,*
- *at National conferences, chair sessions, introduce special guests or speakers,*
- *provide advisory service to National Council as requested,*
- *chair or be a member of Task Forces which are responsible for the preparation of position papers,*
- *sit on the National Awards jury,*

## 2.22 APPENDIX — CANADIAN INSTITUTE OF PLANNERS EXAMINATION FOR MEMBERSHIP

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### The following information should be carefully noted by the applicant:

1. The examination is in partial fulfillment of the requirements for admittance to Membership in the Canadian Institute of Planners. An Oral Examination will also be held.
  2. The written examination will be set for a maximum of four hours. It may be written in either English or French.
  3. The written examination will be graded by two Examiners appointed by the Institute, and where necessary by a third Examiner. The results of the examination will be transmitted to the Membership Committee for consideration.
  4. The examination consists of four questions, each designed to test the applicant on one aspect of the planning process:
    - a) *an understanding of the comprehensive planning process and of inter-relationships among disciplines contributing to the process and among various kinds of issues that impinge on planning problems;*
    - b) *an understanding of planning theories;*
    - c) *an understanding of how policies and plans are formulated; and*
    - d) *a grasp of how policies and plans are implemented.*
  5. The four questions in the examination cover four different areas of knowledge, the use of essentially the same information to answer all four questions will result in the candidate not passing.
  6. All four questions are to be answered based on the candidate's practical experience as well as theoretical knowledge and ability to conceptualize. Answers that do not include any theoretical or conceptual knowledge will result in the candidate not passing.
- The sources of conceptual-theoretical thinking can come from the candidate's own conceptualizations or theorizing but there should also be evidence of substantial reading in the field. A candidate will be expected to have had reference to the "Reading List" in preparing for the examination.
7. The Institute recognizes the presence of a wide array of specialist skills within the practice of planning. In responding to the examination questions, an applicant may choose to answer in terms of their special "Field of Interest". "Fields of Interest" as approved by the Institute include but are not limited to:
    - ✓ Comprehensive physical planning
    - ✓ Administration for planning and development
    - ✓ Transportation planning
    - ✓ Community Planning
    - ✓ Community facilities planning
    - ✓ Research methodology and theory
    - ✓ Economic planning
    - ✓ Social planning
    - ✓ Planning Law
    - ✓ Programming and budgeting
    - ✓ Urban design
    - ✓ Resources and regional development
    - ✓ Environmental planning
    - ✓ Recreation and open space planning
    - ✓ Strategic Planning
    - ✓ Housing Policy

The Applicant may indicate a Field of Interest not included in the above list. The Applicant must obtain approval of the chosen field of interest before taking the examination.
  8. The written examination will not be graded solely on content. Form and manner of presentation and organization of thought will also be taken into account.
  9. In deciding whether a candidate should pass, the examiners are concerned both with knowledge as well as evidence that

the candidate can think and write at a professional level, and that the candidate's knowledge extends beyond his or her specific job experience.

10. In grading examinations, the Examiner will not have a preconceived model of the planning process in mind. Rather, the Examiner will be looking for the applicant's reasoning and grasp of that process.
11. Examinations may be conducted at the discretion of the Affiliate and/or the Institute. Arrangements may be made to allow applicants to write the examination in or near their local area.
12. The Examination Procedure followed by the Institute consists of the following:
  - a) *The eligibility of applicants to sit the examination is determined by the appropriate Membership Committee.*
  - b) *The appropriate Membership Committee sets the time and place for the examination and the applicant is notified.*
  - c) *The completed examination is graded by two Examiners. If there is a split decision, a third examiner is employed.*
  - d) *The final step will see the completion of an Oral Examination to determine whether the candidate should be elected to Membership. The Oral Examination normally follows the successful completion of the examination.*

**CANADIAN INSTITUTE OF PLANNERS****EXAMINATION FOR MEMBERSHIP**

Name of Candidate
Province or Territory
Country of Residence
Place of Examination
Selected Field(s) of Interest (Optional)

**1. SPECIAL INSTRUCTIONS**

- ✓ The Examination is set for a maximum of four hours. It may be written in English or French.
- ✓ Provide answers to ALL questions. All questions are of equal value.
- ✓ Record your answers in the examination booklet provided.
- ✓ Read the instructions to each question carefully. Options are open to you; in each case, please indicate the option you have selected.
- ✓ Return this examination paper with your completed examination to:

**2. ADDITIONAL INSTRUCTIONS**

**Candidates who do not follow these instructions will not pass the examination:**

- ✓ The questions in the examination cover different areas of knowledge - the use of essentially the same information to answer all questions will result in the candidate not passing.
- ✓ All questions are to be answered based on the candidate's practical experience as well as their theoretical knowledge and ability to conceptualize. Answers that do not include any theoretical or conceptual knowledge will result in the candidate not passing.
- ✓ The sources of conceptual-theoretical thinking can come from the candidate's own conceptualizations or theorizing but there should also be evidence of substantial reading in the field.
- ✓ In deciding whether a candidate should pass, the Examiners are concerned both with knowledge as well as evidence that the candidate can think and write at a professional level, and that the candidate's knowledge extends beyond his or her specific job experience.

Examination Received by \_\_\_\_\_

Date \_\_\_\_\_

**QUESTION 1: AWARENESS OF INTERRELATIONSHIPS**

If answering from a particular Field of Interest, please indicate.

- 1) Describe your area of planning specialization. Explain how your knowledge and skills contribute to understanding the interrelationships among physical, environmental, economic, social and built design considerations in planning. How does your area of planning specialization contribute to the total planning process and how does it relate to other areas of expertise within this process?

**In selecting the kind of planning area, you may choose from:**

- ✓ *Region*
- ✓ *Metropolitan area*
- ✓ *City, town, county or other municipal unit*
- ✓ *Neighbourhood*

**In selecting the body you are advising, you may choose from:**

- ✓ *Municipal council*
- ✓ *Planning board*
- ✓ *Highways department*
- ✓ *Citizen's group*
- ✓ *Private developer*

If you feel there are any additional assumptions about this problem situation, which are necessary for your answer, please record them.

**QUESTION 2: PLANNING THEORY**

- 2) A number of theories strive to explain planning and provide the principles that underlie the planning process. Identify and describe two such theories, commenting on their similarities and differences; and discuss the strengths and weaknesses of those two theories as applied in practical situations.

**QUESTION 3: FORMULATING PLANS AND POLICIES**

***Both Questions A and B must be answered***

*If answering from a particular Field of Interest, please indicate.*

- ✓ *The objectives*
- ✓ *The parties involved*
- ✓ *The constraints*
- ✓ *The opportunities*

**If your choice is a "specific" plan or program (rather than a general plan), the following list will provide some examples of the kind of plan and program you will be describing:**

- ✓ *A park/recreation complex*
- ✓ *A transportation and/or transit plan*
- ✓ *An industrial park*
- ✓ *A major commercial development*
- ✓ *A pollution control program*
- ✓ *An economic development program*
- ✓ *A program for developing human resources*
- ✓ *A social services program*
- ✓ *A citizen participation program*
- ✓ *A planning education program*
- ✓ *A strategic plan with spatial components*

This list is not all-inclusive. You may choose to describe for your planning area a specific plan or program not listed above.

- 3A)** In the context of your training and experience in planning, describe the way in which plans and policies are formulated. Comment on the strengths and weaknesses you detect in this planning approach and on the difference between what is being done and what you think should be done.
  
- 3B)** In the context of your training and experience in planning, describe the way in which plans and policies are carried out. Comment on the strengths and weaknesses you detect in this implementation approach and on the differences between what is being done and what you think should be done.

## **2.23 APPENDIX — ORAL EXAMINATION GUIDELINES (TO BE PROVIDED TO CANDIDATE)**

### **Preamble:**

*The Oral Examination will be administered after all other requirements for full membership have been fulfilled by the candidate. As the last check in the process it has a pass/fail outcome. The following guidelines for the examination are not intended to be rigid. It is important, however, that the general intent of the questions be followed in order to provide a consistent format to fairly evaluate all candidates. The oral examination should be scheduled to take approximately 30-45 minutes. It may be conducted in English or French as preferred by the candidate. This page shall be provided to the candidate at least one month prior to the date of the examination.*

### **Questions:**

- (a) The examination should begin with introductions and an explanation of the nature and purpose of the exam.
- (b) The candidate should then be asked to briefly identify and describe their area(s) of planning specialization and to describe the planning process as it relates to their area of specialization. This can be facilitated by asking the candidate to describe their duties and responsibilities in the context of their current job situation.
- (c) Next, ask the candidate to identify the special skills and knowledge which they consider important for the professional practice of planning.

- (d) The candidate should be asked to explain their understanding of professional accountability as a planner, particularly in relation to the nature of the profession's responsibility to the "public interest".
- (e) Candidates with less than two years' experience in Canada, including candidates transferring under Clause 1.1.4 of SCHEDULE "A": the member of the planning profession of another country, should also be questioned on their understanding of the Canadian planning system, e.g. municipal/provincial/ federal jurisdictions, the role of public process, and the existence of relevant legislation.

After the Examination, the Examiners may discuss the candidate's interest in the Institute and the candidate should be encouraged to participate in the affairs of the Institute.

## **2.24 APPENDIX — ORAL EXAMINATION QUESTIONS**

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The questions are intended to be used as a guide to help ensure equal treatment for all candidates and a uniform standard across Canada.

It is not intended that every question be asked, or be asked exactly as written, but every examiner should cover each of the topic areas.

In preparing for the examination, the Examiners should consider the candidate's background (especially the type and length of experience) and, where applicable, comments received from the readers of the Written Examination. Also to be considered is whether the candidate has gained their work experience outside Canada. With this background, the Examiners may wish to tailor questions or create new ones so that they are more specific to the candidate's situation.

### **EXAMPLES OF QUESTIONS**

#### **a) Candidate's Specialization**

1. Describe your planning specialization (to see the thoroughness of his/her understanding of what it entails).
2. Describe your understanding of what "planning" means within the context of your specialization.

#### **b) Skills/Knowledge and the Practice of Planning**

3. What skills are important for the practice of planning?
4. What knowledge is important for the practice of planning?
5. What skills and what knowledge have you acquired that relates to planning?
6. What planning principles do you use in your work?
7. Describe a project you have been involved with and indicate
  - a) *what skills?*
  - b) *what knowledge you needed to undertake it?*
8. Identify what you regard as a well-planned project and describe why you regard it "well planned".
9. (If necessary). How is a planner different from a developer (or, depending on the candidate's work, could be some other example, such as a community activist) with regard to the process, skills, knowledge and obligations?

#### **c) Professional Responsibility and the Public Interest**

10. Discuss the significance of "values" in the planning system and how they get established.
11. What does the term "the public interest" mean to you?
12. How would you identify what the public interest is?
13. Can there be different public interests and, if so, how would you rationalize them?
14. What responsibilities do planners have to the public interest?
15. Is it the planner's role to advocate what he/she believes the public to want?
16. What do you believe should be the role of public participation in the planning process?

#### **d) Professional Responsibility and the Profession**

17. What does the word "professionalism" imply to you?
18. Is having a professional organization essential to the practice of planning?
19. If you become a member of CIP, what responsibilities to the profession does that mean?
20. What, in your opinion, would be unethical actions?
21. Have you been in a situation where you were conscious of a conflict between your professional responsibility and what you were being asked to do?
  - a) *(if yes) How did you handle it?*
  - b) *(if no) Describe a situation in which a conflict might occur.*
22. How strongly should a planner advocate his/her professional opinion?

**e) Less than Two Years in Canada**

23. Describe the differences between the planning system in Canada and in \_\_\_\_\_?  
(if they now or formerly worked as a planner in another country).
24. What are some characteristics of Canadian society that would make a difference in how you as a planner would approach your job compared to \_\_\_\_\_? (another country where they have lived).
25. Is there an equivalent to CIP in \_\_\_\_\_? Are you a member?

**Examiners may also refer to the Special Examination for a suggested line of questioning.**

END OF EXAMINATION

**Commitment to the Institute/Questions by Candidate**

Now that the Examination is over, we'd like to discuss the Institute with you for a few moments.

- a) *How did you first hear of CIP and why did you decide to join?*
- b) *Is there anything about the Institute you think could be improved?*
- c) *What do you think is the public's image of planners?*
- d) *If you joined CIP, is there anything you would like to get involved with?*
- e) *Do you have any questions you'd like to ask, or do you require any further information about the Institute?*

If the Examiners can suggest any activities to the candidate or make contacts, they should.

**INTENT OF EACH OF THE GROUPS OF QUESTIONS****(a) Candidate's Specialization**

The intent is to see if the candidate has a comprehensive grasp of his/her field of operation and understands all the components to it. The candidate's understanding of the field of specialization should not be limited to how he/she is practicing it in daily work but should demonstrate the ability to practice it in other situations. The candidate should demonstrate an understanding of what "planning" means within his/her specialization.

**(b) Skills/Knowledge and Practice of Planning**

The intent is to see if the candidate is knowledgeable as to the tools that a person must have to be able to practice as a planner -- what it is in terms of "hard" knowledge and "soft" skills that distinguish a planner from other professionals. In particular, does the candidate understand that a planner is different from a facilitator or a coordinator and is a doer in her/his own right?

**(c) Professional Responsibility and the Public Interest**

The intent is to see if the candidate understands how the professional interrelates with the public -- how they influence one another and that one is not inherently "right" and the other "wrong". The candidate should understand that the planner is not just the public's mouthpiece.

**(d) Professional Responsibility and the Profession**

The intent is to see if the candidate is aware of the obligations of professionalism and how this will guide her/his conduct in practicing planning. The candidate should understand the planner's responsibility to advocate a "professional" opinion.

**(e) Less Than Two Years in Canada**

The intent is to make sure that candidates with less than two years experience in this country know enough about the formal planning system and the nature of our society to provide competent professional advice. This does not mean knowing the content of any given municipal plan or zoning by-law, but understanding the basic system and knowing where to find the information they need to advise their clients. A secondary intent is to ensure the candidates have the ability to perform on a professional level in the official language of their choice.

**Commitment to the Institute**

The intent is to see that the candidate is seriously motivated in wanting to join the Institute, to establish their interests, and to inform them of any activities in which they could participate. This discussion should take place after the candidate has been informed that the examination is over, and does not form part of the pass/fail criteria.



**Membership in CIP** – Normally, an individual with a recognized planning degree or with a university degree and who is working as a planner becomes a provisional member first, and after logging sufficient professional experience, is entitled to take an examination or submit a portfolio of work for review to qualify for full membership. Full members use the designation: MCIP

**Benefits and Services** – Non-resident members of CIP are full voting members with input into the direction of the Institute. They receive the same national services provided to resident members, including a subscription to Plan Canada, access to the Members only section and on-line membership directory, and special rates at the annual conference.

**Application Process** – Applications for non-residents are handled directly by National Office. Your application for provisional membership must include:

- completed application form and non-refundable fee

**photocopy of your university degrees - accompanied by a letter certifying your academic credentials** – this must be obtained through the **Canadian Information Centre for International Credentials**, 95 St. Clair Avenue West, Suite 1106, Toronto, Ontario M5S 1T9, telephone (416)962-9725, Fax (416)962-2800, Web: [www.cicic.ca](http://www.cicic.ca) or **International Qualifications Assessment Service (IQAS)**, 4th Floor, Sterling Place, 9940 106 Street, Edmonton, AB T5K 2N2, Telephone (780) 427-2655, Fax (780) 422-9734 Web: [www.learning.gov.ab.ca/iqas](http://www.learning.gov.ab.ca/iqas)

- **certified university transcripts**

**To qualify for full membership, which entitles you to use the initials MCIP after your name, you will need:**

- provisional membership in CIP
- a completed application form and non-refundable fee
- two to six years of responsible professional planning experience **witnessed by a supervising full Member of the Canadian Institute of Planners or a certified Member of the American Institute of Certified Planners or a certified Member of the Royal Town Planning Institute.**
  - 2 years - with a recognized degree in planning from a Canadian university*
  - 4 years - with a university degree in a field related to planning*
  - 6 years - with a university degree in a field not related to planning*
- an oral examination
- if you do not hold a recognized degree in planning, a written examination or a review of a portfolio of your work
- if you have less than two years responsible professional planning experience in Canada, a special written examination on the Canadian planning system.

Upon review of your file, the membership committee may require further information. In particular, to be a member of the Institute the candidate must show they are sufficiently familiar with Canadian planning and that they have reasonable language skills. There may be circumstances when the Membership Committee will not be able to process an application, where adequate supervision by an MCIP and communication with the candidate is not possible.

**Fees**– Application fee for provisional membership: \$100

Application fee for full membership: \$100

Examination fee (oral): \$150

Examination or portfolio fee (written): \$150 per exam or portfolio

Annual membership fee (full or provisional): \$182.00 plus GST (*subject to change as determined by Council*).

**AICP** – By virtue of a reciprocal agreement with the American Institute of Certified Planners, CIP recognizes professional experience and education obtained by full members in the U.S. Individuals applying from U.S. join the planning profession in the U.S. first, before applying to CIP. You must still successfully fulfill the examination requirements prior to being granted Full Membership.

**RTPI** – By virtue of a reciprocal agreement with the Royal Town Planning Institute, CIP recognizes professional experience and education obtained by Full members of the RTPI. You must still successfully fulfill the examination requirements of the Institute prior to being granted Full Membership.

## **2.26 APPENDIX — LOGBOOK**

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### **PREAMBLE**

Since 1919, the Canadian Institute of Planners has been dedicated to the advancement of planning – an applied science and art based upon knowledge and wisdom gained through education and experience. Although planning philosophy, theory, and practice have evolved over the years, the essential values advocated by the Institute are derived from a long and honourable tradition.

Planners work for the public good, taking health, aesthetics, equity and efficiency into consideration. Planning respects the land as a community resource, contributing to the conservation of natural and cultural heritage, and promoting healthy communities and improvements to quality of life.

Being accountable to their clients, the public and future generations, members of the Institute must practice in an ethical and responsible manner. Hence, the Institute has created the following Statement of Values, which is intended as a source of inspiration and guidance for professional planners in Canada. The Code of Practice forms the basis of planning practice by members; it is enforceable through the disciplinary provisions of the national membership by-law or through the complementary Code of Practice and by-laws as may be adopted by the Institute's affiliates.

**Persons who wish to become members of the Institute must record their work experience in the Log Book, as described in the following excerpts from the by-laws:**

- *The log book shall set out the responsible professional planning experience of the candidate, reflecting, where possible, the specialized interest of the candidate.*
- *The log book shall show the duration of time for each item or responsible professional planning experience, and*
- *each item so noted shall have the signature of the supervising Member as witness to the completion of the work so described, and*
- *the composition of the work recorded shall correspond to the definition of planning and to responsible professional planning experience.*

A candidate for membership can obtain a Log Book and other information on application for members from the membership committee of the affiliate of the Canadian Institute of Planners in which he or she resides:

**The Atlantic Planners Institute**  
**Ordre des urbanistes du Québec**  
**The Ontario Professional Planners Institute**  
**Manitoba Professional Planners Institute**  
**The Association of Professional Community Planners of Saskatchewan**  
**The Alberta Association of CIP**  
**Planning Institute of British Columbia**

The affiliate will provide detailed information on the combination of education and experience required for members, and the Log Book must be completed under the general supervision of the affiliate membership committee. The Committee will also inform the candidate of any additional requirements of the affiliate with respect to membership. Candidates resident outside Canada should contact the national office of CIP.

**The following definitions and guidelines will assist the candidate in the completion of the Log Book:**

*"Planning"* means the planning of the scientific, aesthetic and orderly disposition of land, resources, facilities and services with a view to securing the physical, economic and social efficiency, health and well-being of urban and rural communities;

"Responsible Professional Planning Experience" means work:

- a) *comprising analysis, projection, design or program development which specifically requires consideration of the inter-relationships of space and time among resources, facilities and activities and which expresses this consideration in a manner to influence the disposition of land or the allocation of resources, facilities or services,*
- b) *which shows a specific relationship to public policies or programs for controlling or influencing the development of communities,*
- c) *which comprises a substantive component of initiative, judgment, substantial involvement and personal accountability or definition or preparation of significant elements of the program of work.*

### **EXPERIENCE**

In addition to completing the necessary period of experience, applicants must also have experience in at least two types of planning work with at least six months being spent in one of these two types. In determining what constitutes different types of experience, the following table serves to identify three broad categories:

<b>Scale</b>	<b>Process</b>	<b>Subject Matter</b>
Building Group	Analysis	Comprehensive physical planning
Neighborhood or District	Projection	Administration for planning and development
	Design	Transportation planning
Municipality	Program Development	Research methodology and theory
Metropolitan Area	Other	Renewal planning
Regional		Economic planning
Territorial		Social planning
Provincial		Planning law
National		Programming and budgeting
		Urban design
		Resources and regional development
		Environmental planning
		Recreation and open space planning
		Housing Policy
		Community Planning

Using this table as a guide only, but not being limited to the categories contained therein, one type of experience is regarded as being sufficiently different from another when two of the three categories are different as the following example indicates:

**Example:** *A person working at the building group scale on a design process with housing as the subject matter. If such a person changes merely his subject matter from housing to commercial, then this is not regarded as being sufficiently different. If, however, the change is to neighborhood scale and to comprehensive land use as subject matter, then this would meet the range of experience requirement.*

In recognizing different types of planning experience, a membership committee will use its judgment in interpreting the above list and example, as they obviously do not cover all eventualities.

Schooling or time spent acquiring academic training shall not be considered as part of one's professional planning experience, including in most cases summer or part-time employment while enrolled in an undergraduate academic planning program.

The teaching of planning in a post-secondary Institution is regarded as one type of experience.

The Log Book is the property of the Institute and is subject to audit.

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**SAMPLE LOG BOOKS** (excerpts from the Planning Institute of British Columbia web site).

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**PRIVATE CONSULTANT EXAMPLE**

Record of relevant planning experience for \_\_\_\_\_ from November 1, 1992 to August 31, 1993.

**Socio-Economic Impact Assessment (6 months)**

During this period, I was engaged primarily to conduct a socio-economic impact assessment for an environmental assessment being undertaken by BC Hydro. This project involved a proposal to add a third generating station along the Columbia River, upstream from Castlegar. Each of the reports described the existing environment, predicted effects during construction and operation of the generating station, and recommended impact management measures to address the anticipated impacts.

Because of the large workforce involved, much of the assessment focused on the effects during construction. My responsibilities involved project management for the work components assigned to our firm, supervision of several surveys, including a survey of motel operators in the area, research and analysis, report writing, presentations to Provincial agencies and a citizen's liaison committee.

Three separate reference documents were prepared:

- Local Economy,
- Community and Social Services, and
- Housing and Property Values.

These documents have been submitted to the Ministry of the Environment, as well as other ministries, public agencies and interested parties as part of the background documentation for BC Hydro Environmental

**Assessment - Development Cost Charge Studies (2 months)**

During this period, I was engaged in the conduct of development cost charge studies for a number of municipalities. The purpose was to assist the municipalities in meeting the requirements of the Municipal Act, Section 983. These charges are intended to enable the municipality to recover the cost of capital expenditures attributable to growth.

To determine the appropriate charge, I undertook a number of tasks for each client:

- Review of the municipality's existing system for imposing charges against development through existing bylaws, rezoning agreements, subdivision agreements and other means;
- Identification and description of growth areas;
- Preparation of a 10-year residential and non-residential growth forecast;
- Interviews with municipal staff to identify capital expenditures to be incurred over the next ten years to accommodate the anticipated growth and to determine the share of these expenditures which benefit existing development;
- Preparation of a report which sets out the growth forecast, growth related capital expenditures and recommended charges for residential and non-residential development; and
- Presentation of the report to municipal council.

As the supervisor of \_\_\_\_\_ and as a full member of PIBC, I hereby confirm that the preceding description of the candidate's work is accurate and that it meets the Institute's definition of 'responsible professional planning experience'.

**LOCAL GOVERNMENT EXAMPLE**

Planner 2 District of \_\_\_\_\_

January 1, 1994 to April 30, 1995 (16 months)

### **Policy Matters**

#### Forest Study

- *Review agreement between District and consultant retained to assist the District in preparing a new land use plan and environmental management program for the Coastal Forest Area;*
- *Conduct meetings between the District's consultant and District staff to explain the Terms of Reference and to provide direction and advice to the consultant on the approach to the project;*
- *Review consultant's draft Phase 1 report; and*
- *Forward draft report to relevant agencies and individuals for comment.*

#### Hamlet Study

- *Finalize work program for the Hamlet Study;*
- *Prepare questionnaire to gather information on area residents' attitudes and perceptions on growth;*
- *Gather background information on factors affecting growth;*
- *Analyze questionnaire results and identify possible growth strategy for hamlet;*
- *Prepare information package for Public Meeting;*
- *Present information at Public Meeting and respond to questions and comments from the public;*
- *Evaluate comments received; and*
- *Prepare report to Council recommending that the hamlet be designated a Hamlet (final editing of report by Manager; report signed by Director).*

#### Hamlet of Bigtown OCP Review

- *Analyze questionnaire results;*
- *Formulate preliminary recommendation on whether hamlet should expand and on whether changes to the existing OCP are warranted;*
- *Prepare information package identifying possible growth strategy for hamlet;*
- *Present results at Public Meeting and respond to questions and comments from the public;*
- *Evaluate comments received and identify outstanding issues to be addressed; and*
- *With assistance of local ratepayer organization, arrange a meeting of a 'working group' of residents to discuss issues in more detail (District staff attending included the Manager and myself).*

#### Rural Area and Golf Course Policy Review

- *Conduct background research on municipal approaches to regulating golf courses in rural areas; and*
- *Prepare draft rural area and golf course policies within the larger context of agricultural area policies and report to Council (final editing of policy and report by Manager; report signed by Manager and Director).*

### **Research and Special Projects**

"Options for a Green Land Strategy" represent the District at a regional meeting at which staff from the region present and discuss the findings of the Green Land Strategy; review and comment to the manager on the report.

### **Implementation Matters**

#### Applications

- *Assigned several new development proposals for review;*
- *Responsible for official plan, draft plan of subdivision and zoning bylaw amendment applications connected with each proposal;*
- *Types of proposals include residential high density seniors complex, low density residential, hamlet residential, estate residential, office commercial and mixed residential-office-commercial uses; processing includes:*
- *liaison with developers, consultants, relevant agencies and area residents;*
- *evaluating supporting engineering reports;*
- *evaluating comments received on the proposal;*
- *reviewing and analyzing the proposals;*
- *preparing information reports;*
- *presenting development proposals at statutory public meetings;*
- *formulating professional planning recommendations; and*
- *preparing planning reports to Council (final editing of reports by manager).*

Preliminary proposals provide preliminary planning advice and comment on various proposals, including a mixed residential-office-retail project and a golf course expansion.

As the supervisor of \_\_\_\_\_, I hereby confirm that the preceding description of the candidate's work is accurate.

Jane Doe, Manager  
Date

As the sponsoring full member of \_\_\_\_\_, I hereby confirm that the above statement of the candidate's responsible professional planning work meets the Institute's definition of 'responsible professional planning experience'.

## **Log Book Experience Validation Form**

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Name (Usual Given Name and Initials):
Mr/Ms/Dr/other
Affiliate:
Name of Employer:
Job Title:
<p><b><u>Experience Description</u></b>          In consultation with the membership committee, a candidate may choose to complete one description sheet per project, one sheet per calendar year, or one sheet for each sphere of activity.</p>

Name or Title of Experience:	Location:
Scale: (building group, municipality, region, etc.)	
Process(s): (analysis, projection, design, program development, etc.)	
Subject: (physical planning, economic planning, resources, research, etc.)	
Year of occurrence and duration: (duration in months, #days spent on project, yearly summary, etc.)	
Reporting Relationship: (member on team, report to superior, client directly, etc.)	
Relationship of experience to public policies or programs:	

<p><b>DESCRIPTION OF DUTIES PERFORMED:</b> Describe accurately the work which you have personally done, indicating your specific degree of responsibility for work which was carried out jointly with others, and indicating the relationship of this work to the definition of responsible professional planning experience.</p>	
<p>Other pertinent information: (if any)</p>	
<p>_____ Signature of Candidate:</p> <p>_____ Date</p>	<p>Validation of Full Member of CIP: as a professional superior ( ) / colleague ( ) to this candidate at the time of the work experience, I hereby confirm the foregoing description.</p>
<p>Signature of your Supervisor (not necessarily a member of CIP):</p> <p>_____ Supervisor's signature</p> <p>_____ Supervisor's name</p> <p>_____ Date</p>	<p><b>Signature of Sponsoring Member (must be an MCIP, AICP or an RTPI):</b></p> <p>_____ Sponsoring Member's signature</p> <p>_____ Sponsoring Member's name</p> <p>_____ Date</p>

**2.27 APPENDIX — LIST OF RECOGNIZED EQUIVALENT PROFESSIONS**

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The following is a list of the planning professions of other countries which are recognized by CIP as having equivalent membership standards for the purpose of applications under Clause 1.1.4 of SCHEDULE "A" of By-law No. 1 (1986), as amended:

**LISTE DES PROFESSIONS D'URBANISTE D'AUTRES PAYS RECONNUES COMME EQUIVALENTES**

Liste des professions d'urbaniste dans d'autres pays dont l'Institut reconnaît les critères d'admission comme équivalents aux fins de demandes d'adhésion selon l'article 1.1.4 de l'annexe "A" du règlement no. 1 (1986), tel qu'amendé.

**NAME OF PLANNING PROFESSION EFFECTIVE DATE OF DECISION  
NOM DE LA PROFESSION DATE D'ENTREE EN VIGUEUR**

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**American Institute of Certified Planners (AICP) 1990.09.15**  
**Royal Town Planning Institute (RTPI) 2000**  
**Planning Institute of Australia (PIA) 2006**

**2.28 APPENDIX — SPECIAL EXAMINATION FOR CANDIDATES WITHOUT CANADIAN EXPERIENCE**

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**(1 HOUR IN LENGTH)**

This written examination is for candidates who have less than two years experience, in Canada. It is intended to examine the candidate's understanding of the Canadian planning system. **Answer EITHER Question A or Question B.**

**QA** Describe the Canadian federal system in terms of the constitutional jurisdiction of planning powers and governmental organization and structures in support of planning.

- OR -

**QB** You have just moved to Canada and are working for a client on a land development project. Describe how you would inform yourself of legal and policy requirements affecting the planning and development of the property.

What agencies would you approach, and what kind of information could they be expected to have? Pay special attention to the framework of the planning act, land use and resource policies, and to zoning and official plans.