

Review of NZPI Membership Categories

Background Paper Prepared for Branch Visits in June/July 2014

Purpose of Report: The purpose of this background paper is two fold, it serves:

- a) to provide Branch members with an early overview of issues and options under consideration vis a vis Membership Categories so that they can fully participate in the upcoming branch workshops, and
- b) to advise of the reiterative process and timeframe for the membership review.

Background to Report: In 2012/2013 the NZPI Board identified the following objective within its 2013-2016 Strategic Plan:

“Review existing membership structure and categories with a view to enhance both quality and perception of the planning profession.”

The Strategic Plan 2013-2016 was the focus of extensive consultation with all members of NZPI

This work stream has been delegated to the Membership Working Party through Clause 6.0 of the MWP/NZPI Board Memorandum of Understanding. The Membership Working Party is supported by the CEO and consists of the following membership:

- Todd Whittaker (Chair)
- Dr Caroline Miller
- Jane Douglas
- Perri Duffy
- Andrea Howard
- Alan Moss

As a first step in progressing the review of membership categories the MWP has identified a number of issues and opportunities that it would like to canvas the views of members on. Those issues and opportunities will be used to stimulate discussion and debate at the upcoming branch workshops.

A Commitment to members

The review of the membership categories is a weighty concern that may have significant impact on both the organisation and its members. It is with that significance in mind that the Board and MWP encourages all members to be both innovative and active in raising issues beyond those identified within this paper at the workshops.

Members can also be assured that the Board and MWP are committed to the review being a reiterative process that will enable members to have a number of opportunities to contribute to the conversation. More of that later, for now lets take a look at some of the membership category issues that have been raised consistently and over a long period of time.

Issues that you will be asked to consider in relation to the membership review:

1.1 Issue: Registration or Certification for Planners

The question of registration for the planning profession has been discussed over many years and the debate has been sharpened in recent times through the sentiment survey and related State of Planning session held during the course of the 2014 NZPI conference. Respondents to the survey were asked whether they saw 'registration' (standards for the profession created through legislation) or 'certification' (standards created for the profession through NZPI) as a way of enhancing quality practice within the profession. This issue has been included within the scope of the Membership Category Review.

Some of the questions for members to consider in association with the issue of registration / certification are:

- How would this be different from the current 'full' membership status which currently represents NZPI's premier membership status?
- Whether the preference is for certification or registration (keeping in mind that registration may take many years to achieve)?
- If members wish to see a new category created, for example, a certified practising planner (CPP) category, how would they envisage that being introduced, would CPP replace the 'full' membership category over time or be an additional category that only existing full members can nominate for?
- Please note that if a CPP category was introduced it is most likely that NZPI would expect nominees to undertake a specific and ongoing CPD pathway and assessment before and after achieving that status.

2.1 Issue: Closer relationship between NZPI and Employers

Past survey results, especially the 2012 and 2013 salary survey results, have indicated that the majority of members do not pay for either their subscriptions or CPD. Rather, those costs are typically borne by the employer. With that in mind the question has been raised as to how NZPI could forge a closer relationship with employers to enhance their awareness of NZPI's unique offering.

Some of the questions for members to consider:

- a) Do members see the forging of a closer relationship between NZPI and employers of planners as useful?
- b) If yes, how might that closer relationship be best forged, for example:
 - a. Through the establishment of an “affiliate’ or ‘corporate’ membership category which enables organisations to ‘join’ NZPI
 - b. Through the development of an MOU with employers which offered NZPI branding in return for a commitment to supporting planning employees in their NZPI membership and training?
 - c. Through adapting the Royal Town Planning Institute’s (RTPI) approach i.e. the creation of Learning Partners.

RTPI

RTPI has found its own unique but excellent way of moving closer to those who pay for CPD i.e. employers. They have created a partnership of Learning organisations. In return for supporting their employees in their CPD objectives, organisations can apply to become learning partners who receive the following benefits:

- Inclusion in the online list of RTPI Learning Partners. Widely promoted by the RTPI, appearing in this list is a great way to highlight your organisation to potential graduates, employees or clients.
- Use of the RTPI Learning Partner logo. As a symbol of your organisation's commitment to professional excellence, the logo can be used at careers fairs or on recruitment literature to attract new staff, graduates or on other publications to demonstrate your organisation's commitment to excellence through investment in professional development.
- Eligibility for the Employer Award (for Excellence in Learning and Development) is only open to current RTPI Learning Partner organisations.
- RTPI Learning Partners receive information on new education-related developments via our Education Team as well as ongoing initiatives via the Membership Team.
- Your organisation's chance to be a Learning Partner representative on the RTPI Education, Careers & Lifelong Learning Committee.
- A named contact at the RTPI - the Lifelong Learning Officer - and regular contact with the RTPI.

3.1 Issue: Alternate Entry

Yet another perennial issue raised consistently over past years has been whether to maintain or discard or refine the ‘alternate entry’ to full membership.

Questions for members to consider:

- Do members believe alternate entry has a valued role to play in enabling professionals to pursue a planning career or does it in some way diminish the formal process of university accreditation?
- If alternative entry is maintained, what is the appropriate pathway and process to gain full membership?

4.1 Issue: Transition from Graduate to Full membership

There are a number of graduate members who have shown no appetite over many years to apply for full membership. The NZPI Constitution stipulates the following: *“Where any graduate member has not been elected as a Full member within a period of ten years from the date of becoming a Graduate Member, the graduate membership shall cease and that member shall automatically become an Associate Member of the Institute unless an extension of that period is allowed following application to the Board”*

Questions for members to consider:

- Do members believe 10 years to be an appropriate timeframe in which to expect graduate members to transition? Please note that primary research of our database demonstrates that 147 (almost half) of our graduates are about to experience or have already passed, their tenth anniversary.
- Why are graduate members not progressing to full membership?
- If not 10 years, then how many years would be appropriate for the transition to occur?

5.1 Issue: A special category?

There have been a number of queries addressed to NZPI from members who no longer serve in ‘planning’ positions (they are managers or Commissioners for example). They have indicated that they wish to maintain their full membership but without the requirement to undertake CPD since often the training on offer is no longer appropriate to their role.

Questions for members to consider:

- Should these members be encouraged to adopt Associate membership where no CPD is currently required?
- Or could this be resolved by the development of a specific CPD offering?
- What type of membership category should be available to these members?

6.1 Issue: An interview as part of the full membership application process?

The issue of whether the application process for full membership should include an interview has been raised consistently over the past four years. It has therefore been included in the scope of works for the membership category review.

Questions for members to consider:

- Is the interview seen as a critical step in the membership application process ?
- Could it be replaced if a robust and CPD offering and assessment was in place for those members aspiring to full membership?
- What other techniques or steps could form part of the membership application process?

7.1 Issue: Technician Category?

NZPI has one category of membership titled “Technician”. This category currently has just two members in it.

- Is it appropriate to introduce a sunset clause for this category of membership i.e. no new members be enabled to apply for it whilst the existing two members would be empowered to remain within it.

8.1 Issue: Number of membership categories

NZPI currently has 11 membership categories, many of which have an overseas companion category (please see attachment). The Board is interested in gaining members feedback on streamlining the categories via a sunset clause i.e. no new members accepted into the category and the category itself phased out over a period of time. The following categories are indicative of those that could be transitioned out:

- Technician,
- Life Fellow,
- Hon Member,
- Hon Fellow.

The following categories could also be transitioned out and included as part of a process that is outlined within the regulations?

- Non Active
- Retired

This would leave NZPI with the following existing categories and any new ones that may be agreed on.

- Student
- Graduate
- Full
- Associate
- Fellow

Where to from here?

The Branch workshops at which all of the above and any additional issues raised will be discussed are planned for June/July. Following the workshops the results of the consultation and survey will be analysed and provided to the MWP, the Planning Advisory Committee and Board for further discussion. The table below is indicative of the reiterative process that will be used to achieve a consensus position.

Task	Responsible for facilitating	Timeline
Initial consultation with Board	CEO	Completed
MWP receive report on above consultation	CEO	May
Branch based discussions/workshops on issues	CEO and local Board representative	Late June/July
Members encouraged to fill out membership survey following workshops	CEO	July
MWP, PAC and Board consider responses	CEO to coordinate	July/August
All members consider responses and recommendations through written and verbal feedback	CEO to communicate	August
MWP and PAC consider member feedback and prepare a report and recommendations for the Board	CEO to draft	September
Board consider final report	Board	September
All voting members invited to vote on constitutional change if required	CEO to coordinate	December +

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Attachment A: Existing Membership Categories and numbers

	<u>Dec-13</u>
Associate	368
Fellow	11
Full	786
Grad 1-4	209
GradPlus	341
Honorary	6
Life Fellow	2
Non-Active	20
O/Seas Associate	12
O/Seas Full	37
O/Seas GradPlus	15
O/Seas Grad 1-4	4
Retired	45
Student	158
Technician	<u>2</u>
Total	2016

Attachment B: Relevant clauses on membership from NZPI Constitution

5 Eligibility for Membership

5.1 There shall be eleven classes of membership, called respectively Full Member, Graduate Member, Student Member, Retired Member, Honorary Member, Technician, Associate Member, Non-Active Member, Fellow, Life Fellow, and Honorary Fellow.

All classes except Student, Retired, Non-Active and Honorary may also be held on an "overseas" basis. Elevation to the classes of Life Fellow, Fellow, and Honorary Fellow is by invitation only.

5.2 Full member

Every applicant for election as a Full Member shall demonstrate professional competence in planning by meeting one of the following:

- 5.2.1**
- Completed an academic planning programme at any New Zealand University, College or other teaching institution that has been accredited under policies and procedures adopted by the Institute's Board; or
- 5.2.2**
- Holds a recognised membership in any international planning institute with which the Institute has formalised a reciprocal membership recognition agreement and meet the specific requirements for membership in the Institute as defined in that agreement; or
- 5.2.3**
- Has undertaken a course of tertiary training which does not satisfy the criteria specified in Clause 5.2.1 or 5.2.2 but has worked in planning or associated activities for a period of at least seven years, so that the combination of training and experience enable the

applicant to exhibit a clear, mature, professional and ethical attitude to, commitment to and understanding of planning.

5.3 Every applicant for election as a Full Member shall show evidence of practical experience and an understanding of planning as defined in the Regulations of the Institute.

5.3.1 Every applicant for election as a Full Member shall satisfactorily complete a personal interview by a Membership Interview Panel in accordance with the Regulations of the Institute.

5.4 Student Member

Every applicant for election as a Student Member shall be enrolled in an academic planning programme at any New Zealand University, college or other teaching institution that has been accredited under policies and procedures adopted by the Institute's Board.

5.5 A Student Member shall automatically become a Graduate Member upon completion of a recognised course of study. Evidence of graduation must be provided to the CEO within fifteen working days of any such request.

5.6 Graduate Member

Every applicant for election as a Graduate Member shall have completed an academic planning programme at any New Zealand university, college or other teaching institution that has been accredited under policies and procedures adopted by the Institute's Board, including international institutions recognised through agreements with international planning institutes.

5.7 Upon reaching five years as a Graduate Member, the Graduate Member must meet the annual Continuing Professional Development requirements equivalent to that of a Full Member to ensure that current standards and practices in the planning profession are being met.

5.8 Where any graduate member has not been elected as a Full member within a period of ten years from the date of becoming a Graduate Member, the graduate membership shall cease and that member shall automatically become an Associate Member of the Institute unless an extension of that period is allowed following application to the Board.

5.9 Retired Member

A Full Member who withdraws from professional practice may request a transfer to retired status.

5.10 Honorary Member

The Board shall have the power to elect as an Honorary Member any distinguished person not engaged professionally in the practice of planning and who, by reason of either his/her position or his/her experience in matters relating to planning, appears to the Board to be able to assist in advancing or achieving the objectives of the Institute.

5.11 Technician Member

Every applicant for election as a Technician shall have taken a course of training and passed the examinations of any technical institute, college or institution that has been approved by the Board for Technician Membership.

5.12 Associate Member

An applicant for election to Associate Member, shall be a person of good standing in the community, who is not otherwise eligible to become a member under any other class of membership, by reason of that person having a genuine desire to advance the purpose of planning as set out in this Constitution.

5.13 Non-Active Member

Any Full or Graduate Member may request the to move them to Non-Active membership for up to one year under the following conditions:

5.13.1

Non-Active membership may be renewed annually, by written request,

for no longer than five years;

5.13.2 Non-Active members rescind all rights and privileges of Institute membership for the period in which they are Non-Active;

5.13.3 Non-Active membership shall normally be granted for medical leave or maternity/paternity leave. Non-Active status will not normally be given for changes related to work in a career other than planning or overseas work.

5.13.4 A Non-Active Member may no longer use any of the designatory letters stated in Section 2 of the Regulations;

5.13.5 Non-Active Members who were previously Full Members may not sponsor or nominate anyone for any category of membership.

5.14 Fellow

The Board may from time to time offer invitations or accept nominations for persons to become a Fellow, a Life Fellow or an Honorary Fellow of the Institute in accordance with the following guidelines:

- 5.14.1**
- The candidate shall have been a Full Member for not less than 10 years

5.14.2 During the immediately preceding 10 years the candidate's principal occupation shall have been in the planning profession, of which at least 5 years shall have been in a supervisory capacity whereby the candidate was responsible for planning work undertaken by others

5.14.3 The candidate will have rendered conspicuous service to the planning profession. Such service may include involvement with the Institute, contributions to planning education, promotion of the planning profession to the wider community, including by the presentation of papers or the preparation of publications, or representation of the profession in Government, non Government, or community bodies or forums.

5.15 Life Fellow

When considering a candidate for elevation to Life Fellow of the Institute, the Board shall take into account guidance from the following criteria:

5.15. 1. • The candidate is a Fellow of the Institute.

5.15.2 • The candidate has rendered distinguished service to the profession of planning; that is, a service that is considered outstanding and generally performed by a person considered eminent and superior in reputation as a planner.

- 5.15.3**
- The candidate is most likely to be a person approaching retirement after a long and distinguished career in the planning profession.

5.16 Honorary Fellow

When considering a candidate for elevation to Honorary Fellow of the Institute, the Board shall take into account guidance from the following criteria:

- 5.16.1**
- A candidate will not have been a Full Member of the Institute and need not have been a member of the Institute.
- 5.16.2**
- The candidate will be distinguished by scientific, artistic, literary, political, or other eminent attainments and whose activities promote or have promoted the aims and objects of the Institute.

