

PROFESSIONAL CONDUCT REVIEW

Overseeing and upholding high standards of ethics and professionalism is a key function of PIBC as a self-regulating professional organization. As outlined in PIBC's bylaws, the Institute meets this obligation through upholding the Institute's Code of Ethics & Professional Conduct which all Corporate members are required to follow. The bylaws also establish and mandate the Professional Conduct Review Committee to undertake this role. Throughout 2024, Alex Taylor RPP, MCIP continued in his role as Chair of the Committee, which is also supported by volunteer members who contributed to this valuable work throughout the year.

BYLAWS & COMMITTEE ROLE:

Significant portions of the Institute's bylaws (in particular Part 13) establish the structure and processes for professional conduct review and outline and guide the disciplinary process. These sections outline the processes for complaints, investigations, review hearings, and the imposition of discipline stemming from findings of misconduct against professional members. While the process is somewhat detailed, sometimes complex, and can be lengthy, it is designed to be fair, thorough, and deliberative while aiming to broadly uphold the principles of natural justice – taking complaints or allegations of misconduct seriously while also balancing and respecting the rights of members who are the subject of complaints.

The responsibilities of the Professional Conduct Review Committee include:

- Managing and administering the Institute's response to formal complaints and allegations of misconduct against Corporate members;
- Assisting the Institute in upholding the Code – seeking compliance by members; and
- Providing education or training to members regarding best practices of ethical and professional conduct.

The Committee remained highly active in 2024 and continued its efforts handling complaints, to ensure that investigations were completed efficiently and thoroughly. Both the Committee and staff focused on monitoring and refining our administrative processes and capacity in support of an effective, fair, and efficient disciplinary process.

Part 14 of the Institute's Bylaws contain the Code of Ethics and Professional Conduct (the Code). The Code is the key policy element that underpins the Institute's ethical standards and expectations for professional members.

Members are encouraged to review the Code on an ongoing basis to keep informed and aware – particularly if you are a new planner, an RPP who is mentoring a Candidate member,

or if you find yourself facing potential ethical questions or challenges in the practice of your planning work.

For the complete current Bylaws, including the Code, visit: <https://www.pibc.bc.ca/official-documents>

ADDRESSING COMPLAINTS:

Upon receipt of any formal written complaint of alleged professional misconduct by a member, in accordance with the bylaws, the Committee Chair assigns two members of the Committee to act as the case officers for the complaint or case. The assigned case officers conduct an initial investigation which includes reviewing the complaint, notifying the subject member and requesting a response to the complaint from them, gathering information, assessing the merits of the complaint under the Code of Ethics & Professional Conduct, and preparing and delivering a report and recommendation to the Chair in accordance with the bylaws. The Chair reviews the report received from the case officers and proceeds accordingly, based on the findings and determinations of the initial investigation.

Depending on the findings, next steps in the process could include: dismissing the complaint with no further action; confirming an agreed 'consent discipline action' resolution of the matter (where the subject member admits certain misconduct and accepts some agreed disciplinary action as a result); or proceeding to a formal disciplinary review hearing to fully adjudicate the matter in a formal quasi-judicial process. In the event of any finding of misconduct against a member, disciplinary measures would then subsequently be imposed in accordance with the bylaws.

Over the course of 2024 there were two new formal complaints received, and case files initiated within the Institute's disciplinary process. Work from five previous complaints and case files also carried over into 2024. As of the end of the year, two of the active cases were closed, one was placed in abeyance due to jurisdictional considerations, while four others remained active. The two new complaints initiated in 2024 were initiated by members of the public. The continued caseload in 2024 required significant volunteer and staff time to manage over the course of the year. To help increase volunteer capacity, a process to recruit new volunteer members was commenced in 2024. As a result of this recruitment process, it is expected that new members will be appointed to the Committee in 2025.

Less formal inquiries to the Institute related to the use of the protected RPP designation, misrepresentation of professional qualifications or membership status, or inquiries about non-corporate members are occasionally received by the Institute as well. These are normally handled directly with the individuals involved without a formal complaint or professional conduct review process as appropriate.



SUPPORT & POLICY WORK:

During 2024 there were no substantial policy and process changes (such as further revisions to the bylaws), however, the Committee completed and finalized a new comprehensive PCRC policies and procedures manual which was approved by the Board in November 2024. This new formalized internal manual now guides, supports and assists the Committee and staff in their work on professional conduct and disciplinary matters. In tandem with the manual, a large number of templates for regular, recurring documents (letters, reports, etc.) used in PCRC processes have also been developed.

In summer 2024, the Committee also established a working group tasked with reviewing and proposing revisions and updates to the Code to ensure it still meets the needs of the Institute, the profession, and the public interest. Additionally, with the support of staff, legal counsel, and experienced Committee members, knowledge sharing within the Committee and volunteer training for members continued in 2024.

EDUCATION FOR MEMBERS:

In addition to its role in handling individual formal complaints of alleged professional misconduct, the Committee continued to support the ongoing education and training of PIBC members on matters of ethics and professionalism throughout 2024. As part of this work, volunteer members organize and deliver a session on ethics and professionalism at each PIBC annual conference. This took place as part of the 2024 BC Land Summit conference held in May in Nanaimo, BC. Additionally, the Committee helped deliver the second annual offering of the current version of the free 'Ethics and Professionalism for Planners' online webinar, which was held in December 2024. Recordings of this and other previous online ethics and professionalism webinars delivered by PIBC continue to be accessible to members via the Institute's YouTube channel as an ongoing resource.

As in past years, the Committee continued in 2024 to provide support to individual members with specific inquiries on

issues and questions related to ethics and professionalism. Designated Committee members offered occasional confidential general ethical guidance and feedback regarding members' ethical questions or dilemmas raised with the Institute.

COMMITTEE VOLUNTEERS & THANKS:

The important and valuable work of the Professional Conduct Review Committee is made possible each year through the dedication and valuable contributions of volunteer members. Under the guidance of the Chair, and with the assistance of Institute staff and legal counsel as appropriate, members of the Committee continued work on the Committee's key activity areas such as:

- Acting as case officers (conducting initial investigations of complaints);
- Contributing to member education and training for members;
- Providing ethics and professionalism guidance in response to member inquiries throughout 2024; and
- Commencing a review of the Code of Ethics and Professional Conduct.

Professional disciplinary cases typically require significant time and effort throughout the various stages of the process. The commitment and contributions of all the volunteer members are greatly appreciated. Thank you!

Looking ahead, the Committee will continue its work to review of the Code of Ethics & Professional Conduct, implement its new policy and procedures manual and templates, and enhance other related administrative resources, while continuing to strengthen and train volunteer resources, and explore any potential bylaw and policy changes. We thank those who have served (and continue to serve) and look forward to the participation of new volunteer members who will be joining the Committee in the future.

Thank you again.

PIBC Professional Conduct Review

2024 Case Summary

Although the Institute fields various general professional practice inquiries each year, typically only a relatively small number result in formal complaints. In 2024 two new formal complaints were received, and five previous cases carried over into 2024. No other investigations were initiated in response to any information about potential member misconduct in the public domain. As of December 31, 2024, work on two formal cases had been fully concluded, one was placed in abeyance due to lack of jurisdiction, and four remained actively open at various stages of the process.

The following provides a general summary status update on cases addressed or under review at various stages in the professional conduct review process during 2024:

- A previous case from 2022 resulting from a formal complaint by a PIBC member regarding the conduct of another member in a professional context was concluded at the beginning of the year, following successful completion of the initial investigation by the case officers at the end of the previous year. This case was resolved by consent discipline.
- A previous case from 2023 resulting from a formal complaint by a PIBC member regarding the professional work of a member was concluded following successful completion of the initial investigation by the case officers. There was no further action with respect to the complaint.
- A previous case from 2023 resulting from a formal complaint by a PIBC member regarding the conduct of another member in a professional context remained under initial investigation as of the end of the year.
- A previous case from 2023 resulting from a formal complaint by a local government regarding the conduct and work of a member was near completion, with the successful conclusion of the initial investigation by the case officers as of the end of the year.
- A previous case from 2023 resulting from a formal complaint by a PIBC member regarding the conduct and work of a former member was placed in abeyance.
- A new case in 2024 resulting from a formal complaint by a member of the public regarding the conduct and work of a member remained under initial investigation as of the end of the year.
- A new case in 2024 resulting from a formal complaint by a member of the public regarding the conduct and work of a member was underway with the initial investigation nearing completion as of the end of the year.

Some of the general ethical and professional issues that have often arisen through some of the recent and ongoing cases include:

- Providing accurate professional information and advice;
- Professional responsibilities to the profession and other professionals;
- Providing opportunities for meaningful participation in the planning process; and
- Exercising professional judgment independently and without bias.