



Annual Report
2017



Canadian Institute of Planners
**Planning Student
Trust Fund**



CIP/ICU Planning Student Trust Fund

141 Laurier Ave West, Suite 1112
Ottawa, Ontario K1P 5J3
Canada

Charitable registration no. 889709499 RR0001

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"I want to thank the Canadian Institute of Planners and the Planning Student Trust Fund for the President's Scholarship this year. Being a recipient of this award really excites my research and work in the field of climate change policy and inclusive community planning. I deeply appreciate the encouragement and financial assistance from the organization, in hopes that I am able to provide meaningful work for my community in Vancouver and the Metro area. It is important to me that if there are people who want to make a difference in their community, but they come across barriers along the way, we as planners need to find innovative solutions to engage and have their voices heard."

Kai Okazaki, University of British Columbia

Celebrating our VOLUNTEERS

2016-2017

CIP-PSTF Board of Directors

Stephen Jewczyk FCIP - President
Neil Connelly MCIP, RPP - Vice-President
Alex Taylor MCIP, RPP - Treasurer
David McKay MCIP, RPP - Secretary
Blaire Chisholm MCIP, RPP - Director
Derek Coleman MCIP, RPP - Director
Amanda Grochowich MCIP, RPP - Director
Glenn Tunnock MCIP, RPP - Director

2017-2018

CIP-PSTF Board of Directors

Stephen Jewczyk FCIP - President
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Alex Taylor MCIP, RPP - Treasurer
Amanda Grochowich MCIP, RPP - Secretary
Blaire Chisholm MCIP, RPP - Director
Derek Coleman MCIP, RPP - Director
Kevin Duguay MCIP, RPP - Director
Heather Sadler MCIP, RPP - Director
Glenn Tunnock MCIP, RPP - Director

CIP-PSTF Governance Committee

Kevin Duguay MCIP, RPP
Amanda Grochowich MCIP, RPP
Stephen Jewczyk FCIP
Heather Sadler MCIP, RPP
Glenn Tunnock MCIP, RPP

CIP-PSTF Fundraising Committee

Neil Connelly MCIP, RPP
Amanda Grochowich MCIP, RPP
Stephen Jewczyk FCIP
Alex Taylor MCIP, RPP

CIP-PSTF Scholarships Jury

(awarding the CIP President's Scholarship, Dillon Consulting Scholarship, Wayne D. Smith Scholarship, and Thomas Adams Scholarship)

Glenn Tunnock MCIP, RPP - Chair
Penny Henneberry MCIP, LPP
John Kazilis MCIP, RPP
Shawn Parry MCIP, RPP
Aideen Ratteray Pryse MCIP
Mélodie Simard MCIP, RPP

College of Fellows Travel Scholarship Jury

Bruce Duncan RPP, FCIP - Chair
Anne McIlroy FCIP, RPP
Eric Vance FCIP, RPP
Ian Wight FCIP

President's MESSAGE



This has been a year of renewed energy and engagement for the CIP-PSTF Board of Directors. These volunteers have demonstrated their commitment to CIP-PSTF with their active involvement in a number of initiatives to improve and expand the scholarship program. As a result, it has been a constructive year on which a stronger foundation has been created to build for the future. This could not have been achieved without the involvement of the new staff at CIP, which has had a positive impact on the work of the Board.

At the 2016 AGM, I had outlined a number of initiatives that I hoped the Board would pursue over the coming year. These included a re-examination of our bylaws, the raising of the profile of CIP-PSTF, increasing donations, and finding ways to support scholarship recipients' attendance at the national conference. I am pleased to say that with the collaborative effort of the Board, each of these initiatives were realized in some form or manner in 2017.

Much has been achieved but there is much more to do. In 2018, we will be exploring new funding opportunities, building on our communications, and looking ahead to celebrating CIP-PSTF's 40th anniversary in 2019.

I thank all CIP-PSTF members, including our Board, for their continued support of the organization and the future of the planning profession. Likewise, I also thank our jury members for the time and energy they provided in reviewing the students' submissions and selecting the most deserving scholarship recipients. And of course, tremendous thanks must go to all the donors who contributed to the Fund in 2017.

Finally, I extend my congratulations and best wishes to our 2017 scholarship recipients. We hope that this support will enable you to achieve your full academic and professional potential, and make a meaningful contribution to the future of planning.

A handwritten signature in blue ink that reads "Stephen Jewczyk". The signature is written in a cursive, flowing style.

Stephen Jewczyk FCIP
President - CIP/ICU Planning Student Trust Fund

Thank You to CIP Staff

The work of the CIP-PSTF is supported by the staff of the Canadian Institute of Planners (CIP), in 2017 most notably:

Beth McMahon - Executive Director

Martia Cicalo - Manager, Resources

Valérie Broadfoot - Governance and Committee Coordinator

CIP-PSTF by the Numbers

Established in

1989

First scholarship awarded in

1992

Number of scholarships awarded in 1992

1

Total amount awarded in 1992

\$2,000

Number of scholarships awarded in 2017

5

Total amount awarded in 2017

\$22,500

Number of scholarship recipients to date

104

Total amount awarded to date

\$294,000

Notable

ACHIEVEMENTS

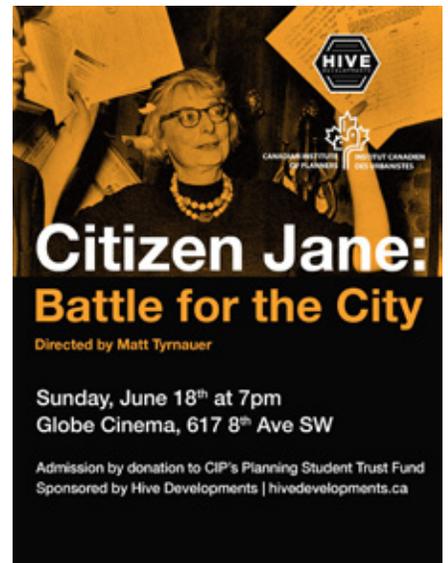
New Bursary

The planning community lost a dedicated and valued member with the sudden passing of CIP Fellow and Board member, David Palubeski, in December 2016. Following this loss, Dave's family and friends decided to honour his generous spirit by establishing a new bursary in his memory. The David Palubeski Bursary, which was announced at the national conference in July, will be awarded to an undergraduate planning student and a graduate student, in alternating years, starting in 2018.



Fundraising

Fundraising efforts in 2017 led to record-setting results! Along with an email campaign to potential corporate donors, CIP-PSTF's fundraising activities focussed on the CIP/APPI conference, 'Building Resilience', in Calgary. Almost \$5,500 was collected at this event via donations made during the gala dinner and at a film screening sponsored by Hive Developments. Special thanks to Conference Co-Chairs Greg Brown RPP, MCIP and Jeff Fielding RPP, MCIP, as well as the rest of the Conference Organizing Committee, for helping make 2017 such remarkable year for CIP-PSTF.



Online Donation Portal

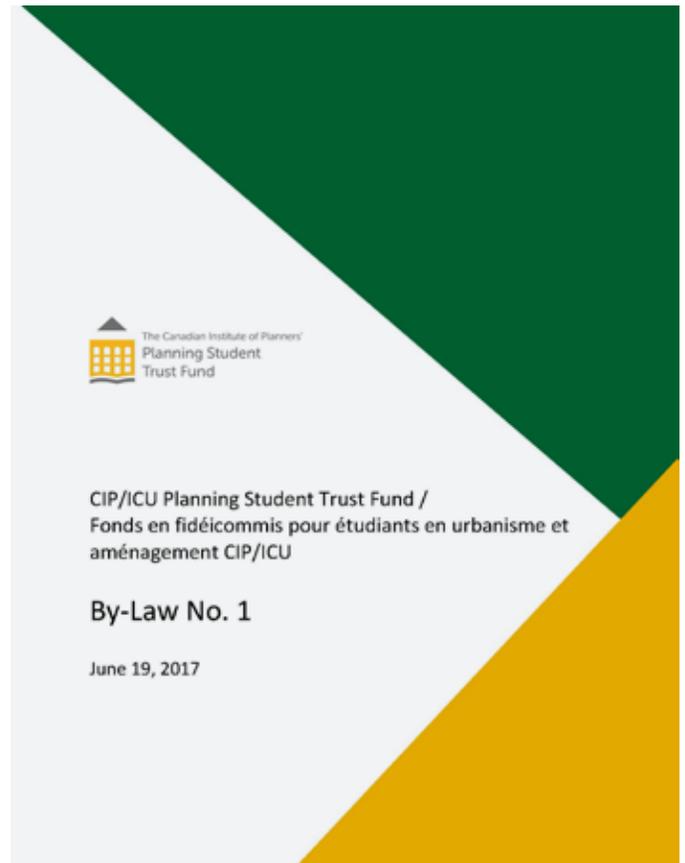
To facilitate donation collection and processing, various platforms were assessed and CanadaHelps.ca was selected as CIP-PSTF's online donation portal. CanadaHelps is a charity and social enterprise with a mission to provide small to medium sized charities with online fundraising solutions that are low-cost, easy-to-use, and secure. We hope our donors will enjoy this new option for making their contributions to the Fund.





The Ages Foundation Travel Awards

Thanks to the Ages Foundation and the Cambridge & North Dumfries Community Foundation, 2017 saw the return of financial support for scholarship recipients' attendance at the national conference. As a result of this funding, which covered travel and registration expenses, students had the opportunity to not only receive their honours in person, but to also connect with other students, professionals, and academics, and to share their experiences back home.



Updated Bylaws

CIP staff and the CIP-PSTF Governance Committee undertook a review of the CIP-PSTF bylaws early in 2017. As a result, amendments to the bylaws were brought forward to the 2017 AGM and approved, bringing them up to date to reflect current practice and procedures. In other governance matters, work began on the review and updating of CIP-PSTF's policies and procedures, with these expected to be documented in a manual in 2018.

SUPPORTERS

The sustainability of the CIP-PSTF scholarship program is dependent on corporate and individual donations. These gifts go towards the advancement of community planning in Canada by providing scholarships to students studying at accredited university planning programs. While it's not possible to list all who have contributed, we would like to give special recognition to the following who provided support to CIP-PSTF in 2017:

- Canadian Institute of Planners
- CIP College of Fellows
- Dillon Consulting
- The late Wayne Daniel Smith
- Ages Foundation / Cambridge & North Dumfries Community Foundation

Through the funding received from its organizational and individual supporters, CIP-PSTF is able to continue to provide a robust scholarship program that recognizes and supports deserving planning students. Thank you to all CIP-PSTF donors – you are assisting Canada's next generation of planning students in their efforts to address current and future planning challenges.

Did you Know?

Each year, CIP donates a portion of the membership fees it collects to the CIP-PSTF. If you were a professional, candidate, or pre-candidate member of CIP in 2017, \$2.00 from your membership fee went towards supporting the Fund.

Thank you!



Thank you to all of our individual donors. Your personal donations are directed towards one of three funding streams:



General
Fund



College of Fellows
Travel Scholarship



David Palubeski
Bursary



Donor Profile: Beate Bowron and Gary Davidson

Beate Bowron and Gary Davidson, both Fellows of CIP, are long-time supporters of the CIP-PSTF's varied scholarship programs. In 2017, they generously supported two programs and reflected on their motivation to do so:

College of Fellows Travel Scholarship: Planning Student Scholarships are extremely important to the profession. They show not only monetary support, but, more significantly, confidence in our up-and-coming planners. As Fellows of the Institute, it behooves us to demonstrate our support every year.

David Palubeski Bursary: This bursary is special because it commemorates an outstanding planner and friend. Bursary recipients will be inspired to live up to David's commitment to the profession and to take pleasure in all aspects of life.



Thank you Beate and Gary for your support!

RECIPIENTS

CIP PRESIDENT'S SCHOLARSHIP \$6,000

Kai Okazaki, University of British Columbia

**“Addressing Barriers to Inclusive Climate Action:
Planning for Immigrants in Metro Vancouver”**

Kai Okazaki grew up in the deep forest and mountainous town of Jasper, Alberta, and is currently pursuing his Master's degree in the School of Community and Regional Planning at the University of British Columbia (UBC). His current work focuses on community energy planning and local climate policy in collaboration with UBC and the City of New Westminister. Kai takes interest in researching on local climate change policy, sustainable community planning, and inclusive planning in the public sector. With his research, Kai hopes that the role of planners can provide equal and inclusive opportunities for all



demographics, specifically immigrants in Metro Vancouver, to empower the underrepresented groups and meaningfully involve them in local planning processes for complex issues, such as climate change. Kai received his Bachelor of Science in Natural Resource Conservation at UBC, doing field research across BC landscape and in India.

DILLON CONSULTING SCHOLARSHIP \$5,000

Zoë Mager, York University

“Planning with Indigenous Peoples: Meaningful Municipal Consultation and Engagement as a Key Part of Reconciliation”

Zoë Mager is currently a student in the Masters of Environmental Studies’ planning program at York University, and has a B.A. Hons. in Indigenous Environmental Studies from Trent University. After graduating high school, Zoë drove a retrofit school bus from Toronto to the Pacific northwest where she she spent the better part of a decade delving into organic farming, sustainable design, and environmental education, and became an aspiring naturalist. She returned to academia as a mature student with a better understanding of her values, sense of place, and professional direction. Zoë’s graduate research examines the legal and moral responsibilities that municipalities and municipal planners have in conducting meaningful consultation, engagement, and relationship-building with Indigenous communities.



2016 COLLEGE OF FELLOWS TRAVEL SCHOLARSHIP \$4,000



Kara Martin, Dalhousie University

“Cycling urban design and implementation”

As a planner, Kara understands that creating bike-friendly cities has profound impacts on the health and prosperity of our communities and environments. To complete her double honours Bachelor degree in Community Design and Sustainability at Dalhousie University, she has chosen to focus on active transportation as a means of creating inclusive and accessible communities. Her passion for urban mobility has led to extensive extracurricular involvement with Halifax cycling advocacy groups and the Dalhousie Bike Society. Having won the 2017 CIP College of Fellows Travel Scholarship, Kara plans on taking a bicycling urbanism Master Course, a three-day intensive course on cycling urban design and implementation for cities taught by the Copenhagenize Design Company in Copenhagen, Denmark. Her participation in this course will enable her to experience world-class cycling facilities while advancing her education in this emerging field. Kara hopes to pursue a career in bicycle urbanism and advocacy. You can read Kara’s report here <http://www.cip-icu.ca/CMSPages/GetFile.aspx?nodeguid=b44681fc-1b98-49b7-8341-6137ed2ebee6&lang=en-US>



Each year, the College of Fellows Travel Scholarship is awarded in honour of a CIP Fellow. In recognition of the 100th anniversary of Canadians’ sacrifices at the Battle of Vimy Ridge, the 2017 honouree was Abram Leland Stanley Nash FCIP (1894-1992). Amongst his many accomplishments, Nash served as a signaller in several battles on the WWI front, including Vimy Ridge, and was awarded the Military Medal for bravery. You can read more about this outstanding individual by visiting CIP’s website.

WAYNE DANIEL SMITH SCHOLARSHIP \$4,500

Zoi de la Peña, York University

“Planning Equitable Public Parks”

Zoi is currently completing her Master’s of Environmental Studies in the Urban Planning stream at York University where she focuses on relationships between nature and mental health, and planning accessible urban green spaces. Prior to beginning her Master’s she completed an undergraduate degree at the University of Toronto in Equity Studies and Forest Conservation. She recently presented preliminary findings from her Master’s research at the Canadian Association for Geographers conference, as well as the Environmental Studies Association of Canada conference. Outside of the classroom you can find Zoi exploring Toronto’s neighbourhoods, parks, and ravines on her bicycle!



“Receiving the Wayne Daniel Smith Scholarship has provided encouragement and reassurance that my topic of research is important and worthwhile. As a grad student, it is easy to go through periods of doubt about one’s work, but receiving this scholarship from the PSTF has provided both the financial and moral support for me to see my research through to its completion.”

Zoi de la Peña, York University

CIP PAST PRESIDENT – THOMAS ADAMS SCHOLARSHIP \$3,000

Robert Catherall, University of British Columbia

“Planning for the Innovation Economy in Vancouver: Lessons from Seattle and San Francisco”

Robert is a problem solver. With an interest in all things urban, he enjoys finding solutions to the unique challenges cities pose by way of policy, practice, and urban governance. Currently studying as an MCRP student at the University of British Columbia’s School of Community & Regional Planning in Vancouver, BC, his research interests include urban regeneration projects, planning for cities at night, and the formal/informal distinction. Before studying urban planning, he was a writer and editor at various media outlets, managed public advocacy media campaigns, and co-produced a non-profit music festival in Vancouver. He is also an avid cyclist and cookbook collector.



CIP/ICU Planning Student Trust Fund

Financial Statements
For the year ended December 31, 2017



CIP/ICU Planning Student Trust Fund
Financial Statements
For the year ended December 31, 2017

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Independent Auditor's Report

**To the Board of Directors of
CIP/ICU Planning Student Trust Fund**

Report on the Financial Statements

We have audited the accompanying financial statements of CIP/ICU Planning Student Trust Fund, which comprise the balance sheet as at December 31, 2017 and the statements of operations and cash flows for the year then ended and a summary of significant accounting policies and other explanatory information.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with Canadian accounting standards for not-for-profit organizations and for such internal controls as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with Canadian generally accepted auditing standards. Those standards require that we comply with ethical requirements and plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal controls relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal controls. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis of our qualified audit opinion.

Independent Auditor's Report (continued)

Basis for Qualified Opinion

In common with many charitable organizations, the Trust Fund derives revenue from donations, the completeness of which is not susceptible of satisfactory audit verification. Accordingly, our verification of this revenue was limited to the amounts recorded in the records of the Trust Fund. The audit opinion on the financial statements for the year ended December 31, 2016 was also qualified because of the possible effects of this limitation of scope. Therefore we were not able to determine whether any adjustments might be necessary to donations revenue, excess of revenue over expenses for the year ended December 31, 2017 and 2016, and assets as at December 31, 2017 and 2016 and net assets at both the beginning and ending of the December 31, 2017 and 2016 years.

Qualified Opinion

In our opinion, except for the effects of the matter described in the Basis for Qualified Opinion Paragraph, the financial statements present fairly, in all material respects, the financial position of CIP/ICU Planning Student Trust Fund as at December 31, 2017 and the results of its operations and cash flows for the year then ended in accordance with Canadian accounting standards for not-for-profit organizations.

Collins Barrow Ottawa LLP

Chartered Professional Accountants, Licensed Public Accountants

May 2, 2018

Ottawa, Ontario

CIP/ICU Planning Student Trust Fund Balance Sheet

December 31 2017 2016

Assets

Current

Cash	\$	70,260	\$	35,257
Short-term investment		34,715		34,406
Government remittances receivable		312		182
Accounts receivable		-		11,408
		-		11,408
	\$	105,287	\$	81,253

Liabilities and Net Assets

Current

Accounts payable and accrued liabilities	\$	1,497	\$	1,742
Deferred contributions (Note 1)		48,078		25,755
		49,575		27,497

Net Assets

Balance, beginning of year		53,756		53,363
Excess of revenue over expenses for the year		1,956		393
		55,712		53,756
Balance, end of year		55,712		53,756
	\$	105,287	\$	81,253

On behalf of the Board:

_____ Trustee

**CIP/ICU Planning Student Trust Fund
Statement of Operations**

For the year ended December 31	2017	2016
Revenue		
Donations	\$ 21,201	\$ 13,500
CIP member levy	11,368	11,408
Interest	310	290
	<hr/> 32,879	<hr/> 25,198
Expenses		
General	568	434
Professional fees	2,702	1,871
Scholarship	22,500	22,500
Travel fund recipients	5,153	-
	<hr/> 30,923	<hr/> 24,805
Excess of revenue over expenses for the year	\$ 1,956	\$ 393

CIP/ICU Planning Student Trust Fund Statement of Cash Flows

For the year ended December 31	2017	2016
Cash flows from operating activities		
Excess of revenue over expenses for the year	\$ 1,956	\$ 393
Changes in non-cash working capital items		
Government remittances receivable	(130)	661
Accounts receivable	11,408	(11,408)
Accounts payable and accrued liabilities	(245)	240
Deferred revenue	22,323	(1,705)
	35,312	(11,819)
Cash flows from investing activities		
Net increase in short-term investment	(309)	(290)
Increase (decrease) in cash during the year	35,003	(12,109)
Cash, beginning of year	35,257	47,366
Cash, end of year	\$ 70,260	\$ 35,257

CIP/ICU Planning Student Trust Fund Summary of Significant Accounting Policies

December 31, 2017

Nature of the Organization

The Trust Fund is incorporated under the Canada Corporations Act as a not-for-profit corporation, is a registered charity and as such is exempt from income taxes. The Trust Fund was continued under the Canada Not-for-profit Corporations Act on September 23, 2014. The purpose of the Trust Fund is to provide annual scholarships to deserving students enrolled in the Canadian Institute of Planner's recognized planning schools.

Basis of Presentation

These financial statements have been prepared in accordance with Canadian accounting standards for not-for-profit organizations and are in accordance with Canadian generally accepted accounting principles.

Financial Instruments

Measurement of financial instrument

Financial instruments are financial assets or liabilities of the Trust Fund where, in general, the Trust Fund has the right to receive cash or another financial asset from another party or the Trust Fund has the obligation to pay another party cash or other financial assets.

The Trust Fund initially measures its financial assets and liabilities at fair value, except for certain non-arm's length transactions which are measured at the exchange amount.

The Trust Fund subsequently measures all its financial assets and financial liabilities at amortized cost.

Financial assets and financial liabilities measured at amortized cost include cash, short-term investment, government remittances receivable and accounts payable and accrued liabilities.

Unless otherwise noted, it is management's opinion that the Trust Fund is not exposed to significant credit, liquidity or interest risks arising from these financial instruments.

Impairment

Financial assets measured at cost are tested for impairment when there are indicators of impairment. The amount of the write-down is recognized in excess of revenues over expenses. The previously recognized impairment loss may be reversed to the extent of the improvement, directly or by adjusting the allowance account, provided it is no greater than the amount that would have been reported at the date of the reversal had the impairment not been recognized previously. The amount of the reversal is recognized in excess of revenue over expenses.

Transaction costs

The Trust Fund recognizes its transaction costs in excess of revenue over expenses in the period incurred. However, financial instruments that will not be subsequently measured at fair value are adjusted by the transaction costs that are directly attributable to their origination, issuance or assumption.

CIP/ICU Planning Student Trust Fund Summary of Significant Accounting Policies

December 31, 2017

Use of Estimates

The preparation of financial statements in accordance with Canadian accounting standards for not-for-profit organizations requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting period. Estimates are used in provisions for accrued liabilities. Actual results could differ from management's best estimates as additional information becomes available in the future.

Revenue Recognition

The Trust Fund uses the deferral method of accounting for contributions. Restricted contributions are recognized as revenue in the year in which the related expenses are incurred. Unrestricted contributions are recognized as revenue in the year received or receivable if the amount to be received can be reasonably estimated and collection is reasonably assured.

Unrestricted investment income is recognized as revenue when earned.

CIP/ICU Planning Student Trust Fund Note to Financial Statements

December 31, 2017

1. **Deferred Contributions**

Deferred contributions represents restricted contributions received in the current or prior years for scholarships to be issued in subsequent years. Changes in deferred contributions are as follows:

	<u>2017</u>	<u>2016</u>
Balance, beginning of year	\$ 25,755	\$ 27,460
Amounts received during the year	30,823	6,795
Less amounts recorded as part of donations revenue during the year	<u>(8,500)</u>	<u>(8,500)</u>
Balance, end of year	<u>\$ 48,078</u>	<u>\$ 25,755</u>

Find out more about the CIP-PSTF
and consider making a tax-deductible donation at
www.cip-icu.ca/About/CIP-ICU-Planning-Student-Trust-Fund

