



Continuous Professional Learning (CPL) System Guide

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1.0 – Introduction: A Program for Planners

1.1 – The API Continuous Professional Learning System

The API Continuous Professional Learning (CPL) system was developed in response to the profession's recognition of its own need as well as the public's growing need for assurance that professionals, planners included, remain current with contemporary theory, methods, and practice within their profession.

The requirement for all API members to participate in the Continuous Professional Learning system was considered and a motion was approved at the 2004 AGM directing Council to move forward. Subsequently the API Council established January 1, 2007 as the effective date for CPL. Following this the membership approved a new API bylaw which included an enablement to establish CPL. The CPL program itself will be overseen by the Council's Standing Committee on Continuous Professional Learning.

The Standing Committee on CPL consists of one member from each Branch of API. The names and contact information for the CPL Committee are on the API Website (www.atlanticplanners.org).

The Canadian Institute of Planners (CIP), through its National Continuing Professional Learning Committee, is in the process of developing a proposed framework that will serve as a national standard for professional learning. CIP's goal is to build a framework from which affiliates may create systems for professional learning that are consistent with the national standard..

This CPL guide describes the protocols and categorization for the recording and administration of Continuous Professional Learning obliged to be undertaken by every Full Member (those who can use the MCIP and FCIP initials) and Provisional Member in Atlantic Canada. The API system is modeled after similar programs instituted by other CIP affiliates.

1.2 – Enablements

CPL is defined in the API Bylaw under clause 1.1(h):

- h) “Continuous Professional Learning” means an ongoing system of learning which is undertaken by a member to advance his or her knowledge, skills or abilities with respect to the theory, methods or practice of planning, and may be referred to as “CPL”;*

The CPL program is enabled under Section 22 of the API Bylaw:

22.0 CONTINUOUS PROFESSIONAL LEARNING

- 22.1 The Council may, by resolution, establish a program of Continuous Professional Learning (CPL) which:*

- a) *may be permissive for any or all classes of membership or mandatory for any or all classes of membership;*
 - b) *may be carried out in collaboration with CIP or any or all of its affiliates;*
 - c) *may require a member to record or verify his or her actions taken to comply with the program;*
 - d) *shall establish standards for compliance with the program;*
 - e) *shall be administered by the Standing Committee on CPL.*
- 22.2 *The Standing Committee on CPL shall, not less than once in each calendar year, review the records of any or all members who are required to comply with the CPL program and determine whether the Members are in compliance with the program.*
- 22.3 *Where a Member is in non-compliance with the CPL program the Standing Committee on CPL shall provide a notice to the Member that he or she is not in compliance with the program, the particulars relative to the non-compliance and order that the Member comply within a period of not less than six (6) months or more than twelve (12) months of the date of the notice.*
- 22.4 *A Member who is in non-compliance with the CPL program following the date by which he or she was ordered to comply shall, with the prior approval of the Council, be struck from the Register of Members in Good Standing until he or she complies with the CPL program;*
- 22.5 *Where a member remains in non-compliance with the CPL program for not less than six (6) months past the date on which he or she was struck from the Register of Members in Good Standing the Standing Committee on CPL shall, following sixty (60) days notice to the Member, recommend to the Council that any disciplinary action contained in clause 21.22(b) be taken against the Member. and the Council may, subject to subsection 22.6:*
- a) *impose the disciplinary action recommended by the Standing Committee on CPL; or*
 - b) *impose any other disciplinary action contained in clause 21.22(b).*
- 22.6 *A member who has received the notice referred to in subsection 22.5 and is dissatisfied with the disciplinary action proposed may, within the sixty (60) day period referred to in subsection 22.5, appeal the proposed disciplinary action and the facts which gave rise to it, to the Secretary and the appeal shall be dealt with in the same manner, and with any appropriate changes, as if it was a complaint and subsections 21.8 to 21.15, inclusive, and 21.18 to 21.31, inclusive, shall apply.*
- 22.7 *The imposition of a disciplinary action under subsections 22.5 or 22.6 shall not relieve the Member of compliance with an order under subsection 22.3;*

National Code of Ethics

The professional nature of their work requires the acceptance by Planners of principles of conduct in their relations with the public, fellow Members of the profession, their clients, their assistants, and students of the profession...

Members have a primary responsibility to define and serve the interests of the public. This requires the use of theories and techniques of planning that inform and structure debate, facilitate communication, and foster understanding...

Members owe diligent, creative, independent, and competent performance of work in pursuit of the client's or employer's interest...

The vitality and credibility of the planning profession, and of the Institute, rely upon the quality of the Members. To further the profession, Members will be expected to attain and maintain a high standard of professional competence and conduct, including their relationship with other Members. Accordingly a Member shall maintain an appropriate awareness of contemporary planning philosophy, theory, and practice by seeking and receiving professional education throughout a planning career

2.0 – Start-Up Information

The API CPL system's starting date was January 1, 2007. Reporting periods will be annual (January 1 to December 31).

3.0 – Learning Units & Professional Learning Activities

3.1 – Learning Units:

Continuous Professional Learning credits are recorded as Learning Units (LU'S). A Learning Unit is one full hour (60-minutes, not including breaks) of approved professional learning activity (e.g. a three-hour session, which includes two 15-minute breaks earns you 2.5 LU's).

The required number of LU's for each reporting period is 18. This number must include a *minimum* of 9 LU's of Organized Structured activities (as defined elsewhere in this guide). A *maximum* of 9 Self Directed LU's is permitted in a reporting period.

Members calculate LU hours for Professional Learning Activities by reporting the number of hours spent (to the nearest quarter hour) with a minimum of 1/2 hour or 0.5 LU's for a single activity.

In some cases, where direct allocation of LU's by time is either difficult or not appropriate, fixed equivalent LU values will apply. Refer to later sections in this guide for more information and examples.

3.2 – Professional Learning Activities:

Professional Learning Activities exist in many formats. Some may be in a typical class setting but there are many other formats that provide professional learning. The Continuous Professional Learning (CPL) System is intended to accommodate members' professional interests and resources available to provide flexibility and access. Although the following list is not all-inclusive, it provides examples of the variety of activities that may qualify for CPL credit.

- Committee or task force duties (professional and/or civic)
- Conferences
- Credit courses (academic institutions)
- Distance Education
- Facility or site tours
- Internet based courses
- Journal Articles / publications
- Lectures / seminars / workshops
- Teaching / research
- Walking Tours (guided)

The purpose of CPL activities is to actively engage members in furthering their knowledge, understanding, skills and abilities, relevant to the theory, methods, and practice of planning. The central concept is that members actively engage in all manner of such relevant activities (organized and structured, and self directed), and be able to contemplate, reflect upon and use the new knowledge, skills or abilities gained from each activity.

3.3 – Professional Learning Activity Categories

There are two broad realms of activities in which Learning Units may be obtained:

1. **Organized & Structured Activities**
2. **Self Directed**

1. **Organized & Structured Activities**

Organized & Structured Activities include structured courses, meetings, seminars and workshops that are provided by API, API's Branches or by an external provider or group, which may or may not be endorsed in advance by API. These would include organized distance education activities.

Members of API will be kept informed of all API program offerings, and activities endorsed by API. For activities endorsed in advance by API, the number of LU's will be indicated by API's CPL Committee. On completion of a professional Learning Activity, the organizer or provider of the activity may keep a record and report members' attendance to API. However, the member must still complete the self-report form through the CIP website (www.cip-icu.ca) in the Members Only section.

2 Self Directed Activities

Self Directed Activities are those which are generally not organized, structured activities. These are largely independent and not usually endorsed in advance by API. To be eligible for credit, Self Directed Activities must be in some way planned, must be educational, yield new knowledge for the individual Member, and apply to the theory, methods or practice of planning.

Self Directed Activities are those in which members independently engage. They often provide support to the profession or society, as well as providing education to members.

Examples of Self Directed Activities include:

- civic or professional committees, including API or CIP Council committees or task forces and API Branch Executive committees or task forces)
- teaching, research or self-designed learning experiences.
- reading articles and publications, which may be supported with self-tests, written reviews or informal sharing of knowledge
- regular, active participation in a civic or professional committee.

Activities that are associated with the day to day responsibilities of employment as a professional planner are *not* eligible as accredited Professional Learning Activities.

3.4 – Reporting of Continuous Professional Learning Activities

To obtain LU credits for each Professional Learning Activity, members will be able to enter the credits via the part of the CIP website page dedicated to CPL and the results will go directly into the Members' records. Regular reports will be received from CIP to the API CPL Committee for review and final approval of all LU's submitted.

All submissions are considered on an individual basis and are subject to review and adjustment of assigned assessments of the eligibility of members reported activities and monitoring of members CPL records will be conducted by the API CPL Committee as required for guidance and clarification.

Members are encouraged to send in their completed LU's as soon as possible after each activity is completed. In that way both the API CPL Committee and the submitting members will be dealing with recent Professional Learning Activities and any concerns can be identified and addressed more promptly.

4.0 – Professional Learning Categories & Topic Areas

4.1 – Categorization of Learning Units

All Learning Units are categorized as either **Organized & Structured** or **Self Directed** depending on the Professional Learning Activity.

Learning Units required annually:	9	Organized & Structured minimum
	9	Individually Directed maximum
	18	TOTAL

All 18 (or more) LU's to be obtained can be Organized & Structured.

4.2 – Continuous Professional Learning Topic Areas

To qualify for Learning Units, the Professional Learning Activity must encompass topic areas which advance knowledge, skills or abilities with respect to the theory, methods and practice of professional planning. The following is an alphabetical list of *just some* subjects that would qualify for API's CPL Learning Units. The eligibility of activities is based on the definition contained in clause 1.1(h) of the API Bylaw. If there is doubt about whether an activity would qualify please contact the CPL Committee for clarification.

- Code of Ethics
- Community Development
- Conflict Resolution and Mediation
- Demographics
- Environmental analysis and issues of land use and development
- Environmental Law
- Heritage Preservation
- Housing
- Management of Planning Projects
- Mapping – GIS
- Official Community Plans
- Planning Law
- Public Input and Analysis
- Regional Planning
- Rural Planning
- Site Design and analysis
- Urban Design / Place Making
- Sustainable Development Practices
- The Local Government Act
- Urban Planning
- Zoning

4.3 – Examples of Some Eligible Activities by Category

Eligible types of planning related activities pertaining to these topic areas could include:

Organized and Structured	Self Directed
Organized or guided walking tours or mobile workshops	Self-directed research (e.g. web, literature, interviews)
Attendance at formal Courses	Critical readings/reviews
Attendance at organized Workshops/Seminars/Lectures	Participation on professional, civic, advisory Boards and Committees (outside regular work duties)
Attendance at API/CIP/APA and Planning related professional Conference sessions	Self-guided educational walking tours
Preparation/Presentation of material for Lectures/Workshops/Seminars/Conference sessions	Self-guided tours and site visits and related discussions or deliverables
Organized Distance Education Programs & activities (tele-learning, correspondence, web based, etc.)	Volunteering on API Council, committees, task forces, exam panels etc.
Organized film presentations/documentaries	Researching and writing professional articles or books for review/publication
Organized presentations/activities of professional community outreach (i.e. to schools, community groups, etc.)	Critical review of professional Learning materials/tools (videos, multimedia, etc.)

4.4 – Guidelines for the Assignment of Fixed Equivalent Learning Units

As indicated previously Members calculate LU hours for Professional Learning Activities by reporting the number of hours spent in planning-related learning (to the nearest quarter hour) with a minimum of 1/2 hour or 0.5 LU's of Professional Learning Activity for a single event.

In some cases, where direct allocation of Learning Units by time is difficult, or not appropriate, fixed equivalent Learning Unit values will apply. As guidance, some examples of activities, in the two categories, with equivalent Learning Unit values assigned are as follows:

Organized & Structured Activities

- Attending a Full day guided tour, field study or mobile workshop **4.0 LU**
- Attending a Half day guided tour, field study or mobile workshop **2.0 LU**
- Attending a guided tour, field study or mobile workshop (where the duration is less than one half day) **1.0 LU**
- Preparation and delivery of material for an organized lecture workshop, seminar, mobile workshop presentation or conference session (depending on length/complexity) **2.0-6.0 LU**
- Researching and writing a professional or academic article for review and organized publication (depending on length/complexity) **3.0-6.0 LU**

- Researching and writing a professional or academic book/text for review and organized publication (depending on length/complexity) **6.0-12.0 LU**

Self Directed Activities

- Participation on professional, civic, advisory Boards and Committees for one year: (per board or committee to a maximum of 4 per year) **2.0 LU**
- Critical reading/review of a journal, academic, or professional article **1.0 LU**
- Critical reading/review of an academic or professional book/text **2.0 LU**
- Volunteering on API Council, committees, task forces, exam panels for one year: (per hour to a maximum of 9 per year) **1.0 LU**
- Volunteering as a Dalhousie University Planning School student mentor for one year: (per meeting to a maximum of 3 per year) **1.0 LU**
- Researching & writing a professional or academic article for review and publication **1.5 LU**
- Researching & writing a professional or academic book/text for review and publication **5.0 LU**

Questions? Members with queries about the eligibility status of activities, and or their equivalent Learning Units, are encouraged to contact the API CPL Committee for guidance.

5.0 – Frequently Asked Questions

5.1 – How do I report acquired Learning Units?

For any accredited API Organized & Structured activity you attend you will be required to report acquired LU's by completing the Self-Report Form on the CIP web site. The Self-Report Form is in the Members Only section of the site. The password to access the Members Only section appears on your annual invoice for members fees and is also available by contacting CIP.

The organizer or provider of the activity may also keep a record, which may be kept or accessed for verification purposes. Please note that it is in your interest to keep accurate back-up documentation of all courses that you attend to help ensure there is no discrepancy in the recording process.

For all Self Directed Activities you must report through the Self-Report Form on the CIP website

5.2 – How will Members' Learning Units be verified?

The members LU submissions to the API CPL system will be accepted in good faith, with random audits and evaluations performed by the API CPL Committee annually.

5.3 – What if I am unable to comply with the CPL requirements in the time periods given?

The primary objective of CPL is to encourage all Members' professional learning. API is committed to helping members to be successful in completing their CPL requirements,

through provision of regular offerings, the annual conference and access to CPL information. Minor concerns will be assessed by the CPL Committee to determine if the Member requires assistance or is subject to special circumstances affecting her or his ability to complete the annual CPL requirement. Only matters of major non-compliance will be referred to the Institute's Professional Practice Review Committee (PPRC) by the Council.

5.4 – Are there any exceptions/exemptions from CPL?

Exceptions and exemptions include medical leave, parental leave or other extraordinary circumstances, reviewed on a case-by-case basis. Otherwise, all Members must participate and satisfy the requirements. Retired members, Honourary members and former Full or Provisional members in good standing who voluntarily withdrew or were granted Leaves of Absence need not comply during their absence from active membership. Upon future reinstatement or admission as an active member, the current requirements must then be maintained. Student and Public Associate members are also exempt from the requirements.

5.5 – Are Provisional Members under the same requirements?

Yes.

5.6 – Can a Member earn LU's from professional learning programs in other provinces or countries?

While there is not yet a Canada-wide CPL system, API's CPL will award learning units for activities acquired and/or accepted in other recognized jurisdictions provided they are verifiable and meet the criteria for CPL activity.

5.7 – What qualifies as distance education activities for the purpose of accumulating LU's?

Distance education is defined as a method of instruction where there is a separation of place and/or time between the instructor and learner, between fellow learners, and/or the learners and the learning resources. Distance education is a valid educational tool for all members whether they live in remote locations or in more urban areas. Multiple delivery methods are possible. This is expected to be a useful method of accumulating Learning Units for members in all locations throughout Atlantic Canada.

Examples of distance-education program delivery:

- Audiotape/audio conferencing
- Television programming (e.g. a knowledge network)
- CD-ROM/software
- Computer software on-line training
- Correspondence (written) courses
- Publication/articles
- Teleconference
- Videotapes
- Internet courses

5.8 – How does CPLS apply to new or reinstated members of the API?

Members who become, or who are reinstated must satisfy the CPL requirements. In the year in which the member has joined or been reinstated the number of LU's required will be calculated proportionately.

5.9 – Can I take the same course twice?

Not usually, but a member may apply to do so if there are extenuating circumstances..

5.10 – Can I exceed the annual requirement and carry forward acquired Learning Units?

Yes. Recognizing that members' access to organized activities may vary from year to year, members may carry up to 9.0 excess Organized and Structured LU's forward as a credit towards the next subsequent reporting year. Self directed LU's may not be carried forward.

5.11 – Can my normal business, work or practice activities be submitted for Learning Unit requirements?

No. The intent is to acquire, investigate or explore new areas of information in addition to or outside the Members' normal daily business or practice. Courses seminars attended during normal working hours may be submitted.

5.12 – What about special In-house Seminars? Can they qualify for LU's?

Yes. This applies to either 'outside' consultants or industry representatives brought in by the business, workplace or practice, or information sessions organized from within the workplace or firm's resources.

5.13 – How long should I keep the paperwork supporting my CPLS records?

It is suggested that you keep your records for the current year plus the previous two years. Any API CPL audit will be done no later than two reporting years following the close of the reporting year for any self-reporting of a member's educational activity.

6.0 Additional Questions & Feedback

Undoubtedly there will be a variety of issues and questions that arise.. The CPL Committee and the Council will be monitoring and reviewing the system as it unfolds. There will be a comprehensive review once the first mandatory reporting period is complete.

Your questions, comments and feedback are important to ensuring the system develops in a manner which is most valuable and effective for the Members. If you have questions or comments please direct them to the CPL Committee.

NOTES