CONTINUOUS PROFESSIONAL LEARNING

GUIDE



Serving Alberta, Northwest Territories and Nunavut

PREAMBLE

This Implementation Guide has been prepared to assist Regulated Members of the Institute in their reporting of learning units to fulfill mandatory continuous professional learning (CPL). Reporting has become mandatory as of January 1, 2013.

One of the requirements to remain a member in good standing with the Alberta Professional Planners Institute, (APPI) and the Canadian Institute of Planners (CIP) is to engage in continuous professional learning as outlined in this Implementation Guide.

You are obligated to acquire and report within a calendar year a minimum of 18 Learning Units (LUs) in specific combination. There is an opportunity to carry up to nine additional specific learning units earned in one calendar year into the next calendar year.

For updates regarding what is considered to be acceptable learning units, a tutorial and FAQ's are available online, please refer to the APPI website (www.albertaplanners.com) and the CIP website (www.cip-icu.ca) for current events and other professional offerings.

Reference is made in this document to: "Regulated Member," the phrase "in good standing," the "Registrar," the "Practice Review Committee," and the "Discipline Committee."

"Regulated Member" means a Registered Professional Planner and a Candidate Member.

"In Good Standing" means any Regulated Member in any category who has paid all dues, levies and other assessments owing within a period of time established by the Council and who is current with ongoing requirements of membership, if any, and who is not suspended.

"Registrar" means the Institute Registrar appointed under the Regulation* and the Bylaws to perform all functions assigned by Council and stipulated in the Act* and Regulation*, including the maintenance of the register of Members of the Institute

"Practice Review Committee" means the Standing Committee appointed by Council pursuant to the Act* and Regulation* to recommend policy to the Council and act on behalf of the Institute with respect to matters relating to competence in the practice of planning under the Regulation*, including the review of the practice of a Regulated Member.

This Guide has been written by volunteers who were asked to form a Continuous Professional Learning Committee, consisting of RPP's drawn from the general membership of the Institute. The Continuous Professional Learning Committee is an <u>ad hoc</u> sub-committee of the Practice Review Committee.

"PTIA" means Provincial & Territorial Institutes & Associations [formerly Affiliates]

*The Professional and Occupational Associations Registration Act of Alberta (Alberta Regulation 119/2011)

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1.0 OBLIGATIONS

1.1 CPL Obligations under Provincial Legislation

In order for the Alberta Professional Planners Institute (APPI) to meet the obligations of the Professional and Occupational Associations Registration Act (POARA) and to maintain our certified members' right to title, the Institute must ensure that all our Regulated Members are participating in Continuous Professional Learning (CPL). The Professional Planner Regulation of POARA, the Canadian Institute of Planners (CIP) Code of Professional Practice, and APPI's Code of Professional Conduct, require that Regulated Members must "maintain currency in the knowledge and skill necessary to carry out the practice of planning" and "must continually seek further knowledge in the theory and practice of planning and all other matters that enhance the reputation of the profession and the Regulated Member".

1.2 Obligations of Regulated Members

All Regulated Members of APPI are required to engage in continuous professional learning and report in a specified manner that they have done so. Regulated Members of APPI include Candidate and Registered Professional Planner (RPP) Members. Non regulated members including those who are non-practicing and students are not required to engage in CPL.

1.3 Required Numbers of Learning Units

The required number of Learning Units (LU's) for each reporting period (January 1st to December 31st) is 18.0 LU's. This must include a minimum of 9.0 LUs of Structured activities. The other learning units can be Structured activities, Unstructured activities, or a combination of the two. Examples of activities that support the acquisition of learning units are discussed further in Section 3 of this Implementation Guide. Responsibility is on the Regulated Member to report acquired learning units.

1.4 Temporary Exemptions

Temporary exemptions to this obligation may be granted by APPI. Any such exemption could be a result of medical leave, parental leave, and temporary leave of up to one calendar year from the profession with an option for an extension. Submit your request for exemption in writing to the APPI office.

1.5 National and Provincial CPL Standards

CIP has set standards regarding continuous professional learning and the PTIA has embraced the standards with some regional variation. The intent of the national standards is to ensure consistency and portability across Canada. The intent of setting variations by an Institute or Association is to provide flexibility to meet regional needs and preferences.

2.0 DESIGNATED COMPETENCIES

2.1 The APPI Competencies Tree

Regulated Members will have different CPL needs depending on where they are in their career and in which geographic region they practice. APPI's members have great flexibility in acquiring structured and unstructured CPL opportunities from APPI, CIP or any other external provider of professional development and in a variety of mediums including but not limited to webinars, in person events, conferences, journals, websites, etc. The core competencies defined for the planning profession in Canada, are required to be developed and championed by all Regulated Members throughout their careers and Members should use the core competencies to guide their learning choices.

The APPI Competencies Tree (Refer to graphic below) has been developed to assist members in their learning endeavours. The tree is based on two categories of core competencies that all Regulated Members shall strive to achieve. They are:

- a) functional core competencies (in dark blue) defined as the common knowledge and skill base of all regulated members; and,
- b) enabling core competencies (in light blue) defined as the capability required to enhance practice effectively–as per the *Professional Planner Regulation* of the <u>Professional and Occupational Associations</u> Registration Act inclusive of our Code of Conduct. (Refer to Appendix 'A').



3.0 PROFESSIONAL LEARNING UNITS AND LEARNING ACTIVITIES

3.1 Continuous Professional Learning

The Continuous Professional Learning Program is intended to accommodate members' professional interests through flexible resources available to all members. Information can be accessed on the APPI website under "Events, Professional Development and Resources."

The purpose of professional learning activities is to engage actively Regulated Members in furthering their knowledge, understanding, skills and abilities, relevant to the theory, methods, and practice of planning. Day to day work activities are not considered to be part of the program of continuous professional learning and hence cannot be included as such. Professional learning activities exist in many formats and are not limited to traditional in-class learning activities.

3.2 Learning Units

CPL is recorded as Learning Units (LU's). One LU represents one hour of approved professional learning activity. LUs cannot be recorded for time spent in registration, travel, health breaks or social gatherings.

3.2 a Deadline for Acquiring and Reporting Learning Units

The reporting deadline is the calendar year end of December 31st and will not be extended. To remain a member in good standing, the minimum of 18 LU's for each year must be acquired and reported on or before December 31st.

3.3 Types of Learning Units: Structured and Unstructured

All LUs are categorized as either Structured or Unstructured depending upon the learning activity. Structured LU's are derived from activities that include any organized courses, meetings, seminars and workshops that are either provided by APPI, CIP and its Provincial Partners, or by an external provider or group, which may or may not be recognized in advance by APPI. These activities would include organized and distance-education activities with live interaction and set learning goals. The delivery of the activity does not have to be 'in-person' but must have the opportunity to be interactive.

Unstructured LU's are derived from activities that are largely independent and not required to be recognized in advance by APPI. Unstructured activities must be in some way planned, must be educational and yield new knowledge for the individual member and apply to the practice of planning but do not have to include live interaction.

3.4 Numbers of Learning Units Required in a Calendar Year

A total of 18.0 LUs is required annually and they may be achieved in specific combinations of Structured or Unstructured learning units. 1.0 hour of learning activity = $1.0 \, \text{LU}$ and can be reported in increments of $15 \, \text{minutes} = 0.25 \, \text{LUs}$.

Where 9.0 Structured LU's have been acquired in the current year, the remaining number of LU's can be any combination of Structured and Unstructured.

A maximum of 9.0 Structured LU's can be carried forward to the next year. This is done automatically by the CIP continuous professional learning reporting system.

3.5 Activities that Support Continuous Professional Learning

Council shall review and set the criteria for continuous professional learning activities for each calendar year and the method of reporting. Any changes to the criteria must be approved prior to June 30th of the calendar year and will not come into effect until January 1st of the subsequent year.

Examples of activities for Structured and Unstructured Learning Units are listed below. The lists of examples are not exhaustive.

Examples of Activities Deemed to be Structured Learning Units

Participation in guided walking tours or mobile workshops locally, regionally and internationally

Attendance and associated study within formal courses

Attendance at organized Workshops/Seminars/Lectures

Attendance at APPI/CIP/APA and planning related professional conference sessions

Presentation of material for Lectures/Workshops/Seminars/Conference sessions

Participation in organized interactive distance education programs & activities (tele-learning, correspondence, web based, including live webinars that could involve marked assignments)

Participation in an organized audio or film presentations/documentaries with interactive discussion either in person or through a live webinar

Delivery of organized presentations/activities of professional community outreach (i.e. to schools, community groups)

Attendance at credit courses, lectures or similar learning activity

Presentation/Delivery of organized planning courses/lectures and training sessions

Publication of planning articles, books and research reports in national and international journals and academic/professional presses

Participation on professional, civic, advisory Boards and Committees (outside regular work duties)

Volunteering on APPI Council, committees, task forces, exam panels

Serving as a mentor to a candidate member within a mentorship program

Examples of Activities Deemed to be Unstructured Learning Units

Self-directed research (e.g. web, literature, interviews)

Critical readings/reviews

Self-guided educational walking tours

Self-guided tours and site visits and related discussions or deliverables

Researching and writing professional articles or books for review/publication in planning journals, publications and books

Critical review of professional development materials/tools (videos, multimedia)

Research and preparation of conference presentations/lectures/workshop material

Research and development of training materials and professional education tools

4.0 ON-LINE REPORTING

LUs are to be reported via the CIP website http://www.cip-icu.ca. A reporting tutorial is attached to this guide and is also available on the APPI website.

http://www.albertaplanners.com/professional-development/continuous-professional-learning

NOTE: The CIP website uses wording related to activities that support learning units which are words different to those used by APPI.

The word "organized" is used by CIP to refer "structured" learning for the purposes of APPI CPL reporting. Similarly, the words "individual" and "self-directed" are used to refer to "unstructured" learning for the purposes of APPI CPL.

Refer to Appendix B Steps Required to Report On-Line

5.0 COMPLIANCE

5.1 Recognition of Achievement

Regulated members will receive correspondence from APPI to confirm that they have met the CPL requirements.

5.2 Non Compliance

A member who is non-compliant with the established criteria of the CPL program at the end of the calendar year shall be removed from the Register of members in Good Standing – effective January 1st of the current year, until she or he complies with the CPL program. APPI will inform these members of their status via email and written correspondence.

The Practice Review Committee shall, by February 28 of each year, review the Continuous Professional Learning records for the previous calendar year of those Regulated Members not in compliance with the CPL program. (Refer to the following graphic).

Missing LU's must be completed and recorded by June 30th of the current year.

The six month extension to June 30th is in place to give those members not in good standing additional time to acquire and report the learning units retroactively to the previous calendar year. These same learning units may not be used to meet the current year's requirements.

Members remain "not in good standing" until they formally request their membership to be reactivated via confirmation of CPL compliance, submission of a reactivation form and the applicable reactivation fee.

5.3 Re-activation of Membership

Any member remaining in breach of the criteria for the CPL program after June 30th of each year, following fourteen days' notice from the Registrar, shall forfeit all privileges and be struck off the Register of the Institute. Where applicable, this includes losing the right to the title of Registered Professional Planner (RPP).

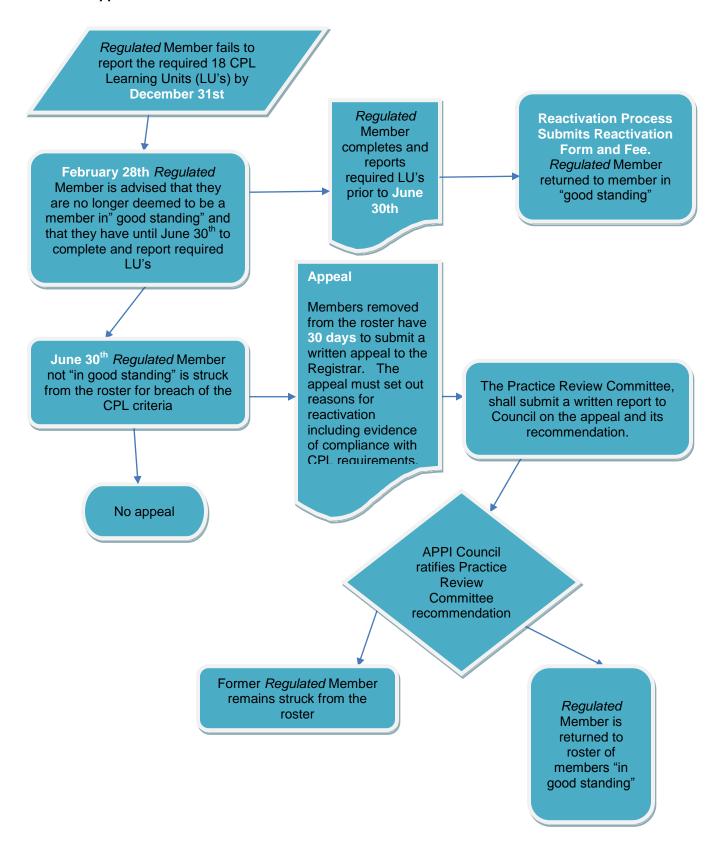
Members who are struck off the Register of the Institute for breach of the criteria for the CPL program after June 30th may not be reactivated, but will need to re-apply as a new Regulated Member of the Institute via the Professional Standards Board and will be required to pay the corresponding assessment/application fees and satisfy all the requirements for membership in effect at the time of their re-application.

5.4 Process of Appeal

A member who is not reactivated in good standing after June 30th for lack of compliance with CPL Program requirements may, by notice in writing served on the Institute Registrar within 30 days of receiving a notice of refusal, appeal to the Practice Review Committee. The notice of appeal must set out the reasons why the application for reactivation should be approved, which should be supported by evidence of compliance with CPL requirement. The Practice Review Committee, in accordance with the provisions in section 12 and 14 of The Professional and Occupational Associations Registration Act of Alberta (Alberta Regulation 119/2011), shall make a written report to the Council on the appeal and its decision.

Refer to the flow chart below.

Process of Appeal



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Appendix A Summary of The Functional and Enabling Core Competencies

Summary of the Functional Core Competencies:

Human Settlement	History & Principles of Community Planning	Government Law and Policy	Plan and Policy Considerations	Plan and Policy Making	Plan and Policy Implementation	Developments In Planning and Policy
Human Settlement and Community, Regional and Provincial Settings Influences on Communities	History of Planning in Canada and other countries	Government and Legislation Policies and Application	Environmental And Sustainable Development Issues Diversity and Inclusiveness Functional Integration of Knowledge Finance and Economics	 Planning Approaches and Focus Developing Visions and Outcomes Strategic Information Gathering and Analysis Obtaining Input and Approvals 	Decision Making and Risk Management Implementatio n Plan Project Management Finance and Administration Evaluation	Emerging Trends and Issues

Summary of Enabling Core Competencies

Critical Thinking	Interpersonal	Communication	Leadership	Professionalism and Ethical Behavior
 Issue Identification Problem Solving and Decision Making Research and Analytical Innovation and Creativity Political Awareness Change Management 	Integrity and trust Diversity and Inclusiveness Facilitation Negotiation Collaboration and Consensus Building Conflict Management	Listening Written, Oral and Visual Presentation Information and Knowledge Use of Information Technology Internal and External Relations	Vision Responsiveness and Influence Team Building Climate of Excellence Managing Resources and Results	ProfessionalismEthical StandardsContinuous Learning

Appendix B Steps Required to Report On-Line

Reporting Tips

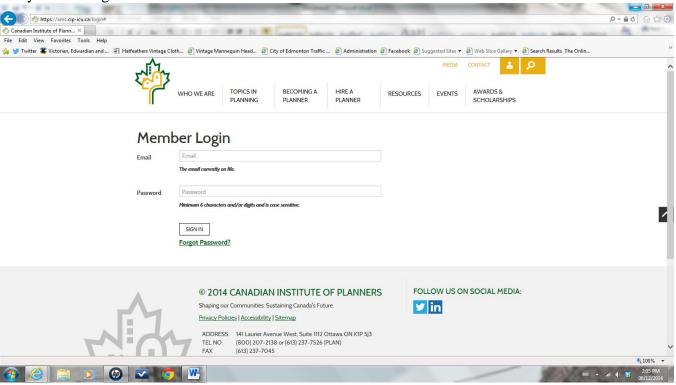
This tutorial provides a few examples of reporting LUs on the CIP website to illustrate the steps that would be required to do so. Here are a few tips for making CPL reporting easier:

- 1. Take a few moments shortly after acquiring LU(s) for a learning activity and report it online. The longer you wait the more difficult it may be to remember event details.
- 2. Keep a paper record of your CPL activities. Many events you will attend provide some kind documentation that you can keep with your records. Receipts of APPI luncheons and events should also be retained. Each APPI member should create and maintain a folder of their CPL activities.
- 3. Consult the APPI Continuous Professional Learning Guide for assistance calculating LUs for a specific activity:

On the CIP website http://www.cip-icu.ca log in by clicking on the symbol shown below in black.

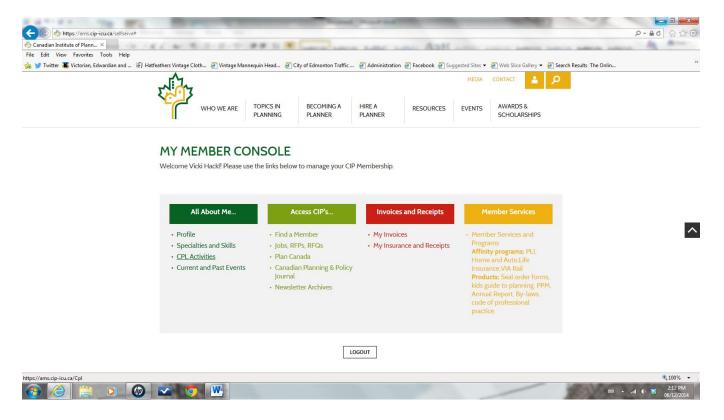


Use your CIP login information.



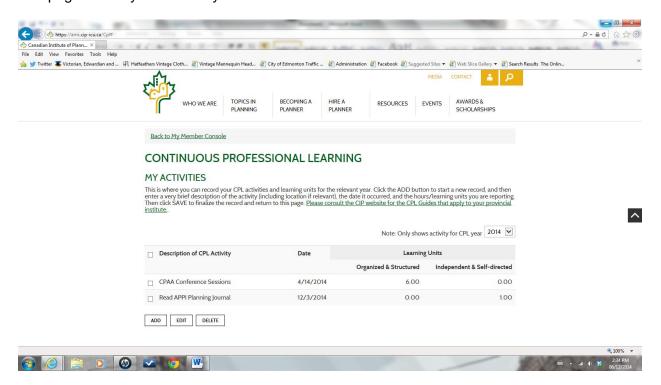
My Member Console

Under All About Me, click on CPL Activities



MY ACTIVITIES

This page shows your current year recorded activities.



To report/input/add your continuous professional activities: Click on the **ADD** button at the bottom of the page.

ADD CPL ACTIVITY /EVENTS

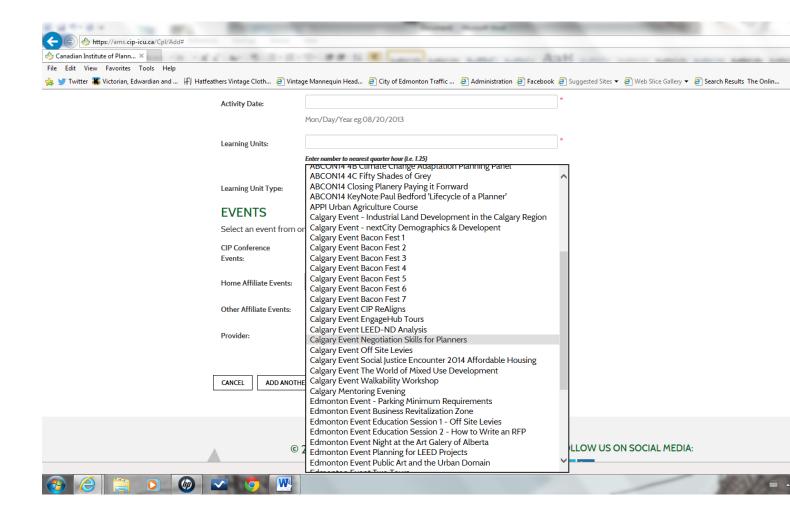
If the activity has been organized by CIP or APPI, they are listed in the following drop down menus: CIP Conference Events
Home Affiliate Events (APPI)
Other Affiliate Events

ADD CPL ACTIVITY

Note: The final date for reporting CPL activities for the current calendar year is December 31.

Description of CPL Activity: 200 characters or less			*
Year to Apply Activity to:	2014	~	*
Activity Date:			*
	Mon/Day/Year eg:08/20/2013		
Learning Units:			*
	Enter number to nearest quarter hour (i.e. 1.25)		
Learning Unit Type:	Organized & Structured	~	*
EVENTS			
Select an event from or	ne of the following three lists if you would like the details auto popu	ılated	l.
CIP Conference	Select an Event	~	or
Events:			
Home Affiliate Events:	Select an Event	~	or
Other Affiliate Events:	Select an Event	v	
Provider:			
CANCEL ADD ANOTHE	R SAVE		

Here is the **Home Affiliate** – APPI drop down menu. All events are listed alphabetically, with the location (or ABConf and WTPD) first for easy searching.



The selected **Activity** will populate the **Description of CPL Activity**, **Year to Apply Activity**, **Learning Units and Learning Unit Type** fields. Click **Save** or **Add Another**

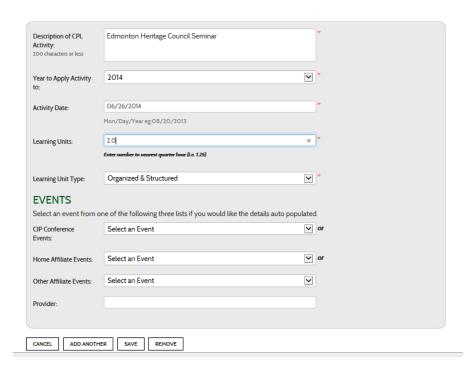
ADD CPL ACTIVITY

Note: The final date for reporting CPL activities for the current calendar year is December 31.

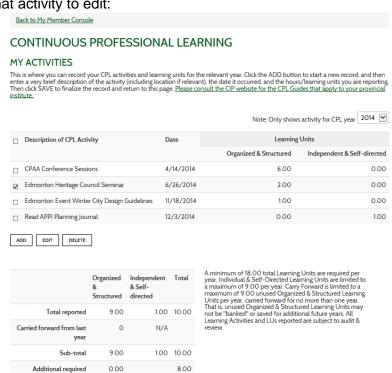
Description of CPL Activity: 200 characters or less	Edmonton Event Winter City Design Guidelines		*
Year to Apply Activity to:	2014	~	*
Activity Date:	11/18/2014		*
	Mon/Day/Year eg:08/20/2013		
Learning Units:	1		*
	Enter number to nearest quarter hour (i.e. 1.25)		
Learning Unit Type:	Organized & Structured	~	*
EVENTS			
Select an event from o	ne of the following three lists if you would like the details auto popu	ılated	1.
CIP Conference	Select an Event	~	O
Events:			
Home Affiliate Events:	Edmonton Event Winter City Design Guidelines	~	0
Other Affiliate Events:	Select an Event	~	
Provider:	APPI		
CANCEL ADD ANOTH	ER SAVE		

To add an activity not provided by CIP or APPI:

Type in the **Description of CPL Activity, Year to Apply Activity, Learning Units and Learning Unit Type** fields. Click **Save** or **Add Another.**



Save. You are returned to the My Member Console with an overview of all of the inputted activities. *To correct or edit an activity* go back to the **My Member Console** and click on that activity to edit:



Input the Provider of the activity in the Provider field and not the description!

EDIT CPL ACTIVITY

Note: The final date for reporting CPL activities for the current calendar year is December 31.

Description of CPL Activity: 200 characters or less	Seminar		*
Year to Apply Activity to:	2014	~	*
Activity Date:	06/26/2014		*
	Mon/Day/Year eg:08/20/2013		
Learning Units:	2.00		*
	Enter number to nearest quarter hour (i.e. 1.25)		
Learning Unit Type:	Organized & Structured	~	*
EVENTS			
Select an event from o	one of the following three lists if you would like the details auto pop	ulated	L
CIP Conference	Select an Event	~	OI
Events:			
Home Affiliate Events:	Select an Event	~	oı
Other Affiliate Events:	Select an Event	~	
Provider:	Heritage Council		
CANCEL SAVE			

To add an unstructured activity:

ADD CPL ACTIVITY

Type the information in the **Description of CPL Activity, Activity Date, Learning Units and the Learning Unit Type – Independent & Self-directed.** Save.

Note: The final date for reporting CPL activities for the current calendar year is December 31. Description of CPL Self guided art walk Activity: 200 characters or less 2014 ~ Year to Apply Activity 06/20/2014 **Activity Date:** Mon/Day/Year eg:08/20/2013 1.5 Learning Units: Enter number to nearest quarter hour (i.e. 1.25) ~ Learning Unit Type: Independent & Self-directed **EVENTS** Select an event from one of the following three lists if you would like the details auto populated. CIP Conference Select an Event Events: Select an Event ✓ or Home Affiliate Events: ~ Other Affiliate Events: Select an Event Provider: CANCEL ADD ANOTHER SAVE

Once the item is saved you will be back at the MY ACTIVITIES screen.

Click on Back to My Member Console to exit the CPL reporting part of your member record.

Back to My Member Console

CONTINUOUS PROFESSIONAL LEARNING

MY ACTIVITIES

This is where you can record your CPL activities and learning units for the relevant year. Click the ADD button to start a new record, and then enter a very brief description of the activity (including location if relevant), the date it occurred, and the hours/learning units you are reporting. Then click SAVE to finalize the record and return to this page. Please consult the CIP website for the CPL Guides that apply to your provincial institute.

Note: Only shows activity for CPL year 2014

☐ Description of CPL Activity	Date	Learning Units		
		Organized & Structured	Independent & Self-directed	
☐ CPAA Conference Sessions	4/14/2014	6.00	0.00	
☐ Self guided art walk	6/20/2014	0.00	1.50	
☐ Seminar	6/26/2014	2.00	0.00	
☐ Edmonton Event Winter City Design Guidelines	11/18/2014	1.00	0.00	
□ Read APPI Planning Journal	12/3/2014	0.00	1.00	

ADD	EDIT	DELETE
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	Organized & Structured	& Self-	Total
Total reported	9.00	2.50	11.50
Carried forward from last year	0	N/A	
Sub-total	9.00	2.50	11.50
Additional required	0.00		6.50
To carry forward	0.00	N/A	

A minimum of 18.00 total Learning Units are required per year. Individual & Self-Directed Learning Units are limited to a maximum of 9.00 per year. Carry Forward is limited to a maximum of 9.00 unused Organized & Structured Learning Units per year, carried forward for no more than one year. That is, unused Organized & Structured Learning Units may not be "banked" or saved for additional future years. All Learning Activities and LUs reported are subject to audit & review.

End of Document