

## WHAT YOU SAID - Member Consultation Summary

In fall of 2004, MPPI's CPL Committee conducted interviews with close to a 20% sample of MPPI's membership to obtain feedback and suggestions for instituting a Continuous Professional Learning (CPL) program for MPPI. The interviews were based on a review of the Planning Institute of British Columbia's (PIBC) Continuous Professional Development System that is currently being implemented, and which CIP is encouraging the affiliates to use as a model for developing their own CPL programs.

The following document is a synopsis of the interview results, which are currently being incorporated into an MPPI-specific CPL program. The CPL Committee anticipates a draft CPL Guide for MPPI's program will be available by spring 2005.

### Overview

There was general agreement with the Continuous Professional Learning (CPL) concept. However, interview findings revealed three prominent issues/concerns associated with examination of PIBC's program. The first issue relates to rural/urban accessibility and costs related to earning credit towards the program—known as Learning Units (LUs). The second issue is the breakdown of how LUs are earned and whether they are proportional to the work expended. Finally, the third issue relates to the need for MPPI to provide additional clarification about the CPL program and address additional questions and recommendations as discussed in this summary. There were also concerns that the CPL concept should be made flexible, incentive driven and include an initial testing period and evaluation to ensure members needs are being addressed.

### 1. Program Format

The interviewers explained to members that MPPI is planning to follow the PIBC model of assigning Learning Units (LUs) for the time spent doing Organized/Structured and Individual/Self-reported activities. LUs are calculated on the number of hours spent in planning-related learning (minus breaks) in activities under these two categories, with a total requirement of earning 18 LUs/year. Of this total, half must be earned as Organized/Structured activities.

***A) Interviewers asked members if they agreed with this plan and if not, to explain why.***

#### Overall Response:

There is a general agreement with the LU concept as a tool to promote professional growth. However, 12 out of 15 respondents cited that program flexibility was required to adequately address members' needs and ability to earn annual LUs. It was also noted that there should be more flexibility in the number

of LUs earned/year and the breakdown of structured and unstructured LUs earned/year to better accommodate various members needs including rural members, those on maternity or paternity leave and those unable to attend sessions during work hours.

Recommendations:

- It was suggested that a trial period, followed up with an evaluation, be conducted to determine an appropriate number of LUs needed/year. This would enable MPPI to determine if members can easily achieve the required LUs with the activities available.
- There should be more flexibility to achieve the # of LUs over a period of two or three years. This would allow planners to carry over credits in good years and borrow credits in bad years.
- CPL should encourage practitioners to produce 'case-in-points' (collaborative student-practitioner research papers) and then encourage other practitioners to critically review these through their own lenses of experience.
- The 9/9 ratio is not flexible enough. This ratio depends on the availability of opportunities. It was also noted that 9 units of organized LUs is a lot of pressure for the affiliate to manage and for people outside Winnipeg to meet.
- One member identified that simply working in a planning related field should give you credit. Work is a legitimate learning experience and other associations give credit for this.
- Formal education/training should not account for more than 1/3 of the overall activities promoted by MPPI as this type of learning usually involves a greater amount of time and cost.
- The onus should be on MPPI to identify or develop courses which can be delivered on a cost-recovery basis to help professionals meet CPL requirements.
- MPPI should encourage peer reviewed books on the website as an exemplary way of gaining credit.
- MPPI should also encourage planners to get involved in the community and give them credit for this even if it is not entirely planning related.

***B) MPPI is recommending that LUs be reported annually, with 18 earned/year. Do you agree? If not, please explain.***

Overall Response:

Half of the members believed that it would be challenging to earn to 18 LUs/year, specifically the requirement of 9 structured LUs/year. It was suggested that there be flexibility to allow reporting every 2 - 3 years (instead of annually) to allow members to play catch up when required. As well, a 2 year reporting period might be more practical from an administrative point of view at both the national and

affiliate level. Only one member mentioned that 18 LUs per year seemed low and suggested an increased number of LUs.

Recommendations:

- 12-15 LUs seems more reasonable

***C) On page 6 of the PIBC guide, PIBC has established a broad list of CPL Topic Areas. To qualify as Learning Units, CPL activities must fall under one or more of these Topic Areas. Do these topic areas encompass all learning areas relevant to MPPI members? If not, please explain what is missing.***

Overall Response:

There was a general agreement that the selected topics covered a broad spectrum of traditional land use planning.

Recommendations:

Members suggested a number of topics missing for planners who do not practice traditional planning, such as:

- Aboriginal land use and management
- Community development/community economic development (CD/CED)
- Crime prevention through environmental design (CPTED)
- Architecture and Landscape design
- Policy development (private and public level)
- Finance
- Theory
- Information Management/Technology
- Performance measurement
- Governance issues
- Program management
- Capacity building
- Rural and regional planning
- Integrated planning models
- Resource management, EIAs, and mapping/air photo interpretation
- Transportation planning

***D) On page 7 and 8 of the PIBC guide, PIBC has established some fixed LUs to some activities as examples. After reviewing these examples, are there any activities listed that, in your opinion, do not have adequate LUs assigned to them? (For this question, we are trying to gauge member's assessment of the types of activities they feel should warrant more credit versus others).***

Overall Response:

There was a general agreement that there needs to be a balance of work, time and energy spent on activities with equal LUs credited for these activities. Members also identified that there was a need to adjust LUs for three main areas including committee/board participation, LUs for preparing as opposed to participating in an event, and LUs for writing or reading articles.

### Recommendations:

#### *Committee/Board Membership:*

- Members believed that participation on professional, civic, advisory Boards and Committees (1 LU/year) was too low considering the amount of time and effort spent. They suggested an increase in LUs in order to encourage committee/board participation.
- Members also suggested that participation on non planning-related civic boards/committees should be allocated additional LUs. There appeared to be a general agreement that while many committees were not directly related to planning experience, they built/enhanced communication, organization, facilitation, problem solving skills and other applicable professional development skills.

#### *Preparing vs. participating:*

- Members noted that there should be a greater weight placed preparing organizing an event versus passively attending an event. This may encourage planners outside of Winnipeg to organize an event for the planners in their area.
- Giving presentations should be given higher value in LUs because they are seen to increase skill building. As well, seminars and lectures are as useful as mobile workshops and should be given the same LUs. Leading a full day tour or workshop should be a minimum of 4 LUs.

#### *Writing vs. reading:*

- The LUs assigned to writing a book and academic article is not enough. (i.e. PIBC model assigns 5 LUs for publishing a book). MPPI could consider assigning LUs by chapter or by number of pages.
- Members suggested weighing LUs based on geography (i.e. rural planners could get .5 LUs more than urban planners for attending a day-long event), or change the 9-9 formula for rural planners. For instance: 7-11 structured / unstructured LUs, or give rural planners a 2 year reporting period to acquire their structured LUs vs. 1 year for urban planners.
- LUs should include work-related articles. These articles will inform work related activities and foster professional development. The program should foster peripheral relationship to the working role.

## **2) Program Type/Cost**

**E) After reviewing the types of activities listed for CPL credit in the PIBC model, do you feel that the types of activities currently/previously available to MPPI members would enable you to achieve the required LUs every reporting period? Please explain.**

Overall Response:

Only a few members agreed that there were enough MPPI activities currently available to earn the required LUs every reporting period. Most of the members expressed concern about rural/urban accessibility issues and concern over 50/50 split between organized/structured and self directed units. It was also noted that current programs that do provide opportunities for CPL are often located in Winnipeg. If more LUs were assigned to organizing events, it is anticipated that rural planners would organize additional events for the planners in their area.

There also appears to be an imbalance between those members who have the opportunity to attend conferences as part of their work and are easily be able to acquire structured LUs for their work time/participation. However, those unable to attend conferences are unable to count more credits for their work at home including reading articles, preparing presentations etc.

Recommendations:

- MPPI should work in consultation with other organizations to ensure there are ample opportunities to earn LUs throughout the year in both urban and rural communities including shifting the 9-9 ratio for rural planners.
- MPPI should also consider that the OPPI offers their members much more events and activities to earn LUs. If MPPI wants the CPL program to work, they must have similar number of events/activities and ensure that these events occur throughout the province. MPPI should also consider co-hosting events with other organizations. These include other town councils (like Brandon, Dauphin or Thompson), local renewal and housing organizations, and local CDCs.
- MPPI should consider having “mobile workshops” that move around from region to region to help rural/remote planners get their structured LUs.
- MPPI should organize a system for disseminating opportunities and provide more than the minimum requirements for professionals to earn enough credit.
- MPPI should formally encourage employers to help subsidize the cost of learning opportunities.

**F) What is the maximum amount of money you would be willing to spend on activities per year to achieve 18 LUs? (i.e. Think about how much you currently spend on activities, would you spend more, less, or the same if more activities were available?).**

Overall Response:

There was a general agreement that professional development is an individual responsibility and that members should expect to spend some of their own time and money citing approximately 30-40 hours/year and \$200-500/year. However, there were a number of concerns about reducing costs and encouraging employer support in professional development. Employers need to help pay for events so that it won't be onerous for members, and MPPI needs to promote the MPPI designation and its benefits to employers. It is anticipated that CPL will help legitimize the profession and encourage employer support (financial).

Recommendations:

- MPPI should encourage employers to endorse and support professional development and provide financial support.

***G) Can you tell us about any other activities, or organizations that currently offer activities, which would fit the Organized/Structured category?***

Overall Response:

Members requested that MPPI facilitate the earning of LUs through identification of events for structured LUs and provide suggestions/recommendations for earning non structured LU through event postings and mail out bulletins.

Recommendations:

- American Planning Association web site for telecom discussion/seminars
- MALA and MALA events
- MAA and MAA events
- CD/CED organizations and conferences
- Frontier Centre conferences
- Chamber of Commerce events
- IPAC
- Urban development institutes (UDI)
- University of Winnipeg and Manitoba departmental lectures, conferences, activities
- Architecture, Geography, Social Studies etc. Manitoba Summer Institute on Population and Health Promotion (Dept of Social Work at U of M), Natural Resource Institute (U of M)
- Association of Manitoba Municipalities (AMM)
- International CPTED Association
- International Downtown Association
- CMHC and other housing organizations
- Manitoba Environmental Industries Association - breakfast seminars
- Government of Manitoba OSD (Organization and Staff Development)
- CED and CEDNET, ESRI, IISD and IUS.

### 3) Program Roll-out/Phase-in

**H) CIP has outlined a roll-out date of January 2006. PIBC offered members an initial 32 month reporting period to make up their initial credit hours to be reported. MPPI is recommending that the first reporting deadline for members be December 31, 2006, with a reporting period retroactive until January 1<sup>st</sup>, 2005 (a total of 24 months). Do you have any comments on this plan?**

#### Overall Response:

There was a general agreement with the proposed roll out phase. However, members felt that this section of the interview required additional clarification. Allowing the program to be phased in will provide the opportunity for people unsure of the program to get adjusted to it. As well, the 24 month roll-out period should be used as a 'pilot' and have members comment again at the end of 2006 to refine the system.

#### Recommendations:

- Optimal flexibility in earning LUs is required and consideration must be given to members who live in rural communities or have extenuating circumstances.
- Members should be able to have permission (from local affiliate) to deviate from requirements (or make special requirements) based on their personal situation.
- The possibility of reporting every two years might allow flexibility to attend some conferences. It is encouraged that the program be evaluated after two years to see if the 18 LU are realistic and what related issues surface.
- The first and second year should be voluntary; the third year should become mandatory.
- Credits should be carried over from year to year to make sure that people can meet requirements.

### 4) Reporting

**I) CIP will be setting up an online reporting system on their web site for members to report on earned LUs as they go. This will be ready by January 2005. MPPI will be required to do annual audits on a 10% sample of members. MPPI will also be required to set consequences for non-compliance with the mandatory reporting or false reporting. Should all affiliates have the same consequences? What should the consequences be for non-compliance and/or false reporting?**

#### Overall Response:

There is a general agreement among members that a national, uniform CIP-directed standard is required to identify major and minor infractions; identify

consequences and disciplinary actions; and identify where affiliates can deviate and what disciplinary action is appropriate. There also needs to be a clear commitment as to how important this initiative is, and how much weight it is being given as part of membership. The CPL committee will also need to ensure that the reporting process is meaningful. As well, they will need to conduct an audit to ensure that there is broad compliance.

#### Recommendations:

- The matter of disciplinary action is really a breach of CIP Code of Professional Practice. CPL should look at the code itself to understand how to address potential disciplinary actions. MPPI must ensure any disciplinary action taken by MPPI (and CIP) on a member—adheres to our code.
- Consequences for minor infractions (i.e. being short 1-2 LUs in a reporting period) could be a warning: (first time)—whereas false reporting is a serious issue and could led to possible suspension by MPPI and CIP.
- MPPI could give a member a period of time to make up missing LUs, and then possibly pursue suspension if this becomes a chronic problem.
- During the first year all persons should be audited (via web site) and MPPI should use the opportunity to evaluate future learning opportunities
- Our first step should be to send a letter to the professional reminding them that they have not met requirements and offer to help them catch up. If the problem persists we should call for a disciplinary board, CPL committee should strike a board to deal with issues if they arise. CIP should be brought in at the very end of the process and only if it is absolutely required.
- There should be recognition on MPPI web site for those members meeting the CPL LU objectives (i.e. incentive vs. disincentive). MPPI should consider offering a certificate/award to recognize “compliance”
- Learning units should be used to build up to different levels of membership. Members who don’t achieve the right amount of learning units would be considered “stagnant”, those who achieved the right number would be considered “in good standing” while those who achieved more would be “gold members”.

#### ***J) Should MPPI manage minor infractions and only refer to CIP any major infractions? Or should all disciplinary action go to CIP?***

#### Overall Response:

There was a general agreement that MPPI (and other affiliates) should deal with minor infractions (late reporting, not meeting 1-2 LUs) and CIP should deal with major infractions like false reporting. Moreover, MPPI should “filter” which decisions should dealt with by CIP and which should be dealt with at the local level.

Recommendations:

- Infractions should be managed on a case-by-case basis and there should be opportunity to bank points for a year to cover special circumstances and consideration of case-by-case basis. Sabbaticals or flexibility should be provided for to address life circumstances.

***K) Should disciplinary action by MPPI be carried out by the CPL committee or by member services? Or should a separate committee be set up?***

Overall Response:

There was a general agreement that minor infractions should be dealt with by each affiliate CPL committee. Affiliate CPL committees should filter all major disciplinary actions to their executive. Each affiliate executive should then take the issue to CIP. Members suggested that a separate committee should only be set up as needed.

Recommendation:

- Affiliates disciplinary actions can utilize a peer “ad hoc” committee where 6-10 MPPI members are brought together on a case-by case basis to deal with member discipline.
- There is also a need for an Appealing Body: MPPI council should act as an appeal body. Where disciplinary action is given, a member must be able to appeal this decision. This appeal body should be the MPPI Executive Council.

**5) Other Feedback**

***L) Please let us know of any other comments/questions you may have that are not covered by these topics and questions. This is only the initial consultation, prior to the MPPI CPL program being developed and your feedback with help with that development. Once a CPL program has been more thoroughly drafted, we will conduct further consultation.***

- The idea of a CPL is very good—we are starting to give ourselves professional credibility. The next step we should pursue is provincial legislation that acknowledges planning as a profession.
- There should be some flexibility allowed for members who cannot receive the 18 LUs (or appropriate 9-9 breakdown) and still be able to comply with CIP standards. We have to make special considerations for new mothers, fathers, sick individuals or individuals taking leave of absences (i.e. working in other countries, provinces) This might be simply changing the 9-9 breakdown (i.e. 6 structured—12 unstructured), or allowing special concerns (i.e. 12 unstructured, 3 structured year 1, and 6 unstructured, 15 structured year 2). Make changes at local or nation level (national better since must be adhered to by each affiliate—regardless of where the member lives).

- There is a need for additional communication of Jan 2006 start date/email, letter, bold information on initiative including a summary/impact highlight sheet attached with resources, contacts etc.
- The CPL should be broad and encompassing to allow isolated groups to have continuing education. This should include a distance education component for those working in remote locations.
- MPPI should review the program on a 3 year basis to ensure validity for the membership.
- There is a real question around the relevance of CIP. Most of the day-to-day work of planners is less focused on the subject and more involved with project management, strategic planning, and information technology. CPL course would need to recognize these as valid areas for pursuit of learning.
- For the CPL to be relevant to all planners, CIP needs to change its focus away from Land Use Planners. A good example is the CIP award of excellence which is only awarded to physical planners, not a lot of recognition for all of the other types of planners.
- This process needs to lead to a discussion about what the core values of planners are. CPL needs to be built around helping practicing planners maintain these core values.
- We should not concentrate on learning; instead we should focus on participation. Learning is not a meaningful term in this context because it is difficult to have people at the same event, getting the same credit but not the same learning. Participation encourages members to attend events and become active; learning might miss the target with some members.

**Points for Clarification:**

- LU hourly calculation is confusing
- There needs to be a clarification on participation in professional committee LUs
- What is the urban/rural availability of Structured Activities (breakdown of events)?
- Will there be a future increase in the number of LUs?
- Can a tax deduction be negotiated for professionally recognized activities?
- What do the MPPI fees do for you?
- Can MPPI subsidize the cost of earning LUs?
- Would people have to request LU approval before going to a non-MPPI event to ensure they get credit?
- Would LUs be determined on an hour for hour basis for non-MPPI events?
- Is the calendar year set or flexible?

- Will the required LUs be pro-rated for new members who come on board part way through the calendar year?
- What is the benefit of being a member? If you lose your membership status are there any ramifications re: employment?
- Is the planning profession recognized, should MPPI be pursuing recognition?
- Why is the CPL happening – is there a problem with members not keeping up? Engineers have no CPL program after P.Eng, why should planners? What benefit is it?
- What constitutes a minor and major infractions?
- If planning in Manitoba is not a legalized professional body then why go this route?
- What is the administrative impact?

For any questions/concerns regarding this document, please contact the MPPI CPL Committee chair, Kristy LeBaron, at [klebaron@gov.mb.ca](mailto:klebaron@gov.mb.ca)