

*Promoting Excellence in Planning*



The Manitoba Professional Planners Institute  
Continuous Professional Learning Program (CPL)

2<sup>nd</sup> Edition - February 2007



## TABLE OF CONTENTS:

### **1.0 Introduction: A Program for Planners**

*1.1 The MPPI Continuous Professional Learning (CPL) Program*

*1.2 National and Affiliate Roles and Responsibilities for CPL*

*1.3 Enabling By-laws*

*1.4 Key Information*

### **2.0 CPL Activities and Learning Units**

*2.1 Professional Learning Activities*

*2.2 Learning Units*

*2.3 Assigned Learning Units*

### **3.0 Reporting CPL Activities**

*3.1 CPL Reporting Requirements*

*3.2 Online Reporting*

*3.3 Compliance & Exemptions*

*3.4 Reporting Assessment*

*3.5 Non-Compliance and Disciplinary Action*

### **Appendix – Frequently Asked Questions**



## 1.0 Introduction: A Program for Planners

### 1.1 The MPPI Continuous Professional Learning Program

In response to the profession's recognition of its own needs as well as the public's growing need for assurance that many professionals--planners included--remain current with contemporary theory, methods, and practice within their profession, the Manitoba Professional Planner's Institute (MPPI) has instituted mandatory Continuous Professional Learning (CPL) as a requirement of membership.

To help members achieve this requirement, MPPI has developed a CPL program that fits the unique needs of planning professionals in Manitoba, while retaining consistency with a national framework currently being initiated by CIP and its Affiliates. This Guide describes the MPPI program for members, its structure, requirements and reporting procedures, and how it fits into the broader national framework.

### 1.2. National and Affiliate Roles and Responsibilities for CPL

**MPPI Council** is the ultimate approval authority for the CPL program and is responsible for approving any program changes, including the allocation of CPL credits, disciplinary action and for directing the CPL Committee where special circumstances arise through administration of the CPL program.

**MPPI's CPL Committee** oversees the administration of the CPL program, is responsible for the drafting and revision of the CPL Guide and works in cooperation with other MPPI Committees to identify and provide adequate CPL opportunities for members.

**MPPI's Membership Committee** will oversee program compliance and assist the CPL Committee with an annual random audit of 10% of the membership.

**CIP** will assist MPPI in ensuring consistency and portability of its CPL program across Affiliates.

MPPI is committed to ensuring the CPL program provides value, is realistic and meets the needs of members whether they practice in large urban areas or more remote northern and/or rural areas. As such, in January 2007 the CPL Committee undertook a revision to the CPL Program Guide to reflect member feedback (obtained from interviews, a survey and general outreach) and to reflect evolving national standards.

***This revised Guide replaces the May 2005 Guide, and becomes effective as of February 2007.***



### 1.3 Enabling By-laws

To institute mandatory CPL for MPPI members, the membership was asked to vote on a mandatory CPL requirement at the October 12, 2005 MPPI AGM. The vote was favorable and the By-laws of the Institute were amended to add the following clause:

**8. In order to better serve the public, each Full and Provisional member shall undertake annual mandatory Continuous Professional learning and shall report on that professional learning to the Association on an annual basis.**

**a) Continuous Professional Learning (CPL) means the specific activities that members actively engage in to further their knowledge, understanding, skills and abilities, relevant to the theory, methods, and practice of planning.**

**b) The Executive Committee shall establish the CPL requirements for the Association in keeping with the standards established by the Institute.**

**c) The Executive Committee shall establish a monitoring procedure in order to determine membership compliance, which procedure may be on a sample basis.**

**d) The Executive Committee shall provide membership with notice of a reasonable number of professional learning activities in order to assist members in fulfilling the structured learning requirement of the CPL program.**

**e) The Executive Committee shall notify and consult with the affiliate membership regarding significant changes to the CPL program prior to the start of the following reporting period to which the changes would apply.**

### 1.4 Key Information about the MPPI CPL Program

Essential information regarding dates and requirements of the CPL program:

- The program's official starting date was January 1, 2005.
- Reporting periods are annual (January 1 to December 31), with each reporting deadline being December 31<sup>st</sup> of each year.
- The required number of Learning Units (LUs) for each reporting period is 18.0 LUs — with a minimum of 9.0 of these learning units being Organized & Structured type activities (as defined elsewhere in this guide).
- In recognition that members' access to organized activities may vary from year to year, members may carry up to 9.0 excess Organized & Structured LUs forward for credit in the next subsequent year. Members may not carry any Independent & Self-Directed LUs forward, and may not "bank" or carry forward excess Organized & Structured LUs for more than one year.
- Learning activities (Organized & Structured activities or Independent & Self-Directed) do not need to be pre-approved by MPPI in order to count for credit.

## 2.0 CPL Activities and Learning Units

### 2.1. Professional Learning Activities

The purpose of the CPL program is to engage members in furthering their knowledge, understanding, skills and abilities, relevant to the theory, methods, and practice of planning. It is expected that members would actively engage in all manner of professional learning activities and be able to contemplate and reflect upon the new knowledge, skills or abilities gained from each activity.

The CPL program is intended to accommodate members' diverse professional interests and provide flexibility and access to a range of professional development opportunities. To achieve this, the program has been designed with two broad categories of learning activity:

#### **a) Organized & Structured Activities**

Organized & Structured Activities include structured courses, presentations, seminars, workshops and guided tours that are either provided by MPPI, CIP and its Affiliates, or by an external provider or group which may or may not be endorsed in advance by MPPI. These would also include different forms of structured, distance education activities.

#### **b) Independent & Self-Directed Activities**

Independent & Self-Directed activities are deliberate, educational, yield new knowledge for the individual Member and should apply to the practice of planning. They are generally not organized by a provider nor do they have any structured delivery or requirements. Examples are civic or professional committees, teaching, reading and self-designed learning experiences. Activities associated with members' day-to-day employment responsibilities as a professional will not be acceptable for credit as valid professional learning activities.

Any questions that members have regarding the eligibility of activities in either category can be directed to the CPL Committee.



## 2.2. Learning Units

Many MPPI members regularly participate in planning related activities outside the general scope of their day-to-day work. Through the CPL program, members would get 'credit' for this participation as it is considered *professional* learning that contributes to their professional development. Under the CPL program, these 'credits' are called **Learning Units (LUs)** and they are calculated in two ways:

**a) Calculated:** For the majority of Organized & Structured activities, members will calculate their learning units as equivalent to the time spent undertaking learning activity—**where one LU is equivalent to one full hour** (60 minutes). Reporting must be to the nearest quarter hour and acceptable activities must be at least ½ hour in duration (equivalent to 0.5 LUs).

*For example, a three and a half hour session of learning activity earns you 3.5 LUs.*

**b) Assigned:** For many Independent & Self-Directed activities (and some Organized & Structured activities) where direct allocation of LUs by time is difficult or not appropriate, approximate equivalent Learning Unit values will be assigned by MPPI or the National CPL Committee.

*Refer to the next section for details on assigned Learning Unit values.*

## 2.3. Assigned Learning Units

The National CPL Committee (made up of CIP and Affiliate representatives) has agreed on a number of learning activities where calculation of Learning Units by time allocation would not be appropriate or accurate. These particular activities, listed on the next page, have been assigned learning unit values which have been adopted by MPPI. To ensure greater consistency across affiliates, these values will be adopted by all Affiliates, as their programs materialize.

This list may be updated annually or as necessary.



## 2007 Assigned Learning Units

<b>Organized &amp; Structured Activities</b>	
<b><i>Attending a Guided Tour, Field Study or Mobile Workshop</i></b>	
Full Day	<b>4.0 LUs</b>
Half Day	<b>2.0 LUs</b>
Less than one Half Day	<b>1.0 LU</b>
<b><i>Leading a Guided Tour, Field Study or Mobile Workshop</i></b>	
Full Day	<b>5.0 LUs</b>
Half Day	<b>3.0 LUs</b>
Less than one Half Day	<b>2.0 LUs</b>
<b><i>Preparation of material for an organized lecture, workshop, seminar, presentation or conference session</i></b>	<b>4.0 LUs</b>
<b><i>Researching &amp; writing a professional or academic article for review and organized publication</i></b>	<b>3.0 – 6.0 LUs</b> (depending on length/complexity)
<b><i>Researching &amp; writing a professional or academic book/text for review and organized publication</i></b>	<b>6.0 – 12.0 LUs</b> (depending on length/complexity)
<b>Independent &amp; Self-Directed Activities</b>	
<b><i>Participation on relevant boards, committees, task forces, or other professional, civic/community volunteerism (outside regular work duties) for one year:</i></b>	
with more than 20 hours of meetings/work per year	<b>5.0 LUs</b>
with between 5 and 20 hours of meetings/work per year	<b>3.5 LUs</b>
with less than 5 hours of meetings/work per year	<b>2.0 LUs</b>
<b><i>Critical reading/review of an academic or professional book/text</i></b>	<b>3.0 LUs</b>
<b><i>Critical reading/review of a journal, academic or professional article</i></b>	<b>1.0 LU</b>
<b><i>Volunteering as a Mentor</i></b>	<b>1.0 LU</b> (for each contact hour with mentee/protégé)
<b>Undertaking a Self-Directed Tour, Field Study, etc</b>	
Full Day	<b>4.0 LUs</b>
Half Day	<b>2.0 LUs</b>
Less than one Half Day	<b>1.0 LU</b>

*If you undertake a learning activity that is not assigned a learning value here and is not appropriate to calculate by time, please make your best judgment on the value when reporting, or contact the CPL committee for assistance.*



## 3.0 Reporting CPL Activities

### 3.1 CPL Reporting Requirements

All Full, Provisional and Fellow MPPI members are required to earn and report on a minimum of 18 Learning Units (LUs) annually, with the calendar year (January 1 to December 31) recognized as the reporting year.

Of the minimum number of LUs required, all 18 can be of the Organized & Structured variety. However, only half the required LUs, or a maximum of 9, may be reported as Independent & Self-Directed in any reporting period.

<b>9 LUs</b>	<b>Organized &amp; Structured Activities (min)</b>
<b>9 LUs</b>	<b><u>Independent &amp; Self-Directed Activities (max)</u></b>
<b>18 LUs</b>	<b>Annual Requirement (minimum total)</b>

To comply with the mandatory CPL requirements, Learning Units must be reported by December 31 of the reporting year in which they were earned.

Should members report LUs in excess of the required 18, they may carry forward a maximum of 9 excess Organized & Structured LUs to the following reporting year. Members may not carry over any Independent & Self-Directed LUs and may not “bank” or carry forward excess Organized & Structured LUs for more than one year.

### 3.2 Online Reporting

Reporting will be done online through CIP’s CPL Report Form, which can be found in the Members Only Area of the CIP website. To access the Members Only Area, members must have a login user name and password. This can be obtained by contacting CIP administration.

Access to the CIP online CPL Report Form can be found at:  
<http://www.cip-icu.ca/English/academic/continue.htm>

The online reporting format allows members to enter LUs as Organized & Structured or as Independent & Self-Directed. Members will be able to enter some of their LUs by using drop down menus where activities have been populated by CIP, the home Affiliate or another Affiliate. When members select from these menus, the LUs and other information will automatically be filled in.



Where activities are not available in drop down menus, members are required to fill in the text boxes with the appropriate information. This includes the date the activity was undertaken, the title of the activity (i.e. name of session, presentation or course; name of book written or read; etc), the provider (i.e. MPPI, another organization) if applicable, and the number of LUs calculated for or assigned to that activity.

It is recommended that members report their learning units over the course of the reporting year, rather than waiting until the December 31<sup>st</sup> deadline. This will make recalling learning activity easier and ensure that activities are reported correctly.

NOTE: It is in your best interest to keep accurate back-up documentation of activities you attend to help ensure there is no discrepancy in the recording process. Additionally, a random audit of 10% of member's CPL records will be conducted annually by MPPI, and members may be asked to verify certain LUs.

### **3.3 Compliance & Exemptions**

In accordance with the Institute's by-laws, all Provisional, Full and Fellow members are required to comply with the mandatory Continuing Professional Learning program requirements on an annual basis. Student, Retired, Associate or Inactive/Non-Practicing members are currently exempt from the reporting requirements.

MPPI also recognizes there are other exceptional circumstances wherein members may have the requirements waived by the Institute. These include:

- Members who are admitted as new Provisional, Full or Fellow members, or who transfer in from another affiliate, part way through a reporting period (after the end of February) are eligible for exemption from the requirements for that year. However these members are encouraged to comply;
- Members who apply for, and are granted written waivers based on special circumstances are exempt from the requirements for that year. Such exemptions may include medical leave and other similar extraordinary circumstances, reviewed on an individual basis. Requests for waivers must be sent to MPPI Council in advance of the reporting deadline for the applicable reporting period.

The Institute will work with Members to assist them in meeting the requirements for CPL.



### 3.4 Reporting Assessment

Members will receive notification on their CPL reporting progress mid-way through the year, in the form of a Progress Report. This report serves as a reminder to members of their CPL requirements.

Additionally, members will receive an Annual Status Report after the December 31<sup>st</sup> reporting deadline and after the CPL committee has conducted a reporting assessment. This Status Report serves as confirmation that a member has or has not fully complied with the CPL requirements for the reporting year, according to MPPI and CIP records.

### 3.5 Non-compliance and Disciplinary Action

The reporting deadline for each reporting period (year) is December 31<sup>st</sup>. Members who are not in compliance with the reporting requirements of CPL for the preceding year as of January 1<sup>st</sup> will cease to be members in good standing of the Institute. Members will be reinstated into good standing if they report their previous learning activity during the grace period between January 1<sup>st</sup> and March 31<sup>st</sup> of each year.

Between April 1<sup>st</sup> and June 30<sup>th</sup> of each year, members may also be reinstated to good standing by completing the necessary requirements for the reporting of CPL for the preceding year and payment of a penalty as set by MPPI Council. Penalties will be invoiced and compliance information placed on the member's file. The penalties are:

- \$25 for members with partial compliance; and
- \$50 for members with zero compliance.

Members who remain non-compliant after June 30<sup>th</sup> will be considered in breach of membership eligibility and, after 14 days notice from the Secretary, may lose their Membership status.

Members who may have a disagreement with the Institute with respect to the assessment and/or acceptance of their CPL reporting, or any other related complaint, may appeal, in writing, to MPPI Council. Council will review and consider any such appeals in accordance with the Institute's by-laws; the relevant policies of the Institute; and the principles of fairness. Council will provide a written response to such Members, outlining the disposition of the appeal and supporting reasons.



## **Appendix A – Frequently Asked Questions**

### **Can a Member earn Learning Units from professional learning programs in other provinces or states?**

Yes. While there is not yet a nation-wide mandatory CPL program, the MPPI program will typically recognize learning units for activities acquired and/or accepted in other recognized jurisdictions provided they are verifiable and meet the standard criteria of any CPL activity.

### **Can you take the same course twice?**

Yes, as long as it is not within the same reporting period and it advances your professional learning (i.e. you will gain new knowledge from taking it a second time).

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

No. The intent is to acquire/investigate/explore new areas of information in addition to or outside the Members' normal daily business or practice. This requires the members' individual assessment of their experience, activities, and duties. There will always be new material to learn. The profession is constantly advancing and one must evolve with it.

### **Can special In-house Seminars qualify for LUs?**

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.

### **Can a variety of distance education activities qualify for the purpose of accumulating LUs?**

Yes. 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 Manitoba.

Examples of distance-education program delivery:

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

### **Additional Questions & Feedback?**

MPPI will continually update and revise the CPL program and this Guide to ensure member needs are addressed. Your questions, comments and feedback are important to ensuring the program develops in a manner which is most valuable and effective for the Members. Please don't hesitate to contact the CPL Committee with your questions or comments.