

Planning Institute
of British Columbia

Continuous Professional Learning System Guide

4th Edition – Revised March 2019



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Introduction: A Program for Professional Planners

The PIBC Continuous Professional Learning Program

Some form of required ongoing professional development or learning is typical and widely considered a best practice for most professional associations like PIBC. First introduced in 2003, the PIBC Continuous Professional Learning (CPL) program was developed to achieve this best practice, and to ensure that all practicing professional planners remain current with contemporary theory, methods, skills and knowledge within their profession.

This 4th edition CPL guide (including subsequent updates) describes the policies and guidelines for the completion, reporting and administration of ongoing professional development to be undertaken by every professional member of PIBC in British Columbia & Yukon (i.e. all active Certified members or RPPs, including practicing Fellows, as well as Candidate members). The system is modeled after similar programs instituted by other professions, and has been modified and improved upon based on members' feedback and experience to date.

Most all other professional planning associations across Canada have CPL requirements, and follow a consistent approach. Through the national Professional Standards Committee – which is responsible for coordinating member professional certification & university program accreditation policies across Canada – PIBC works with those other associations to collaborate and work towards a consistent approach to CPL for all professional planners across Canada.

The requirement for PIBC members to participate in the CPL program was considered and adopted as a new Bylaw by member vote at the May 8th, 2003 PIBC Annual General Meeting. Since then, the applicable Bylaw has been amended and updated by member votes as the system has evolved. The Institute's Board and the Professional Standards & Certification Committee broadly oversee the CPL program. Institute staff manages and administers the implementation of the program. Separately, the Institute's CPL Committee oversees the development and delivery of CPL programming for members, such as webinars, workshops and courses.

Enabling Bylaws

The following excerpts from the PIBC Bylaws outline the enabling policies and requirements that guide and underpin the CPL program:

From PIBC Bylaws – Part 1

– Definitions and Interpretations:

- 1.1.13 “continuous professional learning” or “CPL” means specific activities undertaken by members to further their knowledge, understanding, skills and abilities, relevant to the theory, methods and practice of planning;

From PIBC Bylaws – Part 12

– Continuous Professional Learning:

- 12.1 In order to better serve the public, each member shall undertake mandatory continuous professional learning and shall report that CPL to the Institute each year.
- 12.2 The Board of Directors shall establish the CPL rules, policies and procedures including those for the:
- 12.2.1 Reporting and monitoring of CPL; and
- 12.2.2 Acceptable types of CPL activities.
- 12.3 Any member who is in breach of the CPL rules established by the Board of Directors for the preceding year as of the 30th day of January each year shall be considered to not be a member in good standing and shall be excluded from the register of members.
- 12.4 Between the 30th day of January and the 30th day of June each year, members in breach of the CPL rules established by the Board of Directors for the preceding year may be reinstated to membership in good standing upon the following:
- 12.4.1 Compliance with the CPL rules established by the Board of Directors for the preceding year; and
- 12.4.2 Payment of a penalty fee set by resolution of the Board of Directors.
- 12.5 Any member remaining in breach of the CPL rules established by the Board of Directors for the preceding year after the 30th day of June each shall, after 14 days written notice from the Secretary-Treasurer, forfeit all rights and privileges and be struck from membership in the Institute.

From PIBC Bylaws – Part 14

– Code of Ethics & Professional Conduct:

- 14.1 As ethical planning professionals members should be governed by two basic concepts:
- 14.1.1 They must be competent. This means:
- 14.1.1.1 They must know the competencies for their area of practice; and
- 14.1.1.2 They must be able to successfully apply the competencies.

- 14.1.2 They must have integrity. This means:

14.1.2.1 They must have a keen sense of responsibility to their profession and employers and the public; and

14.1.2.2 They must retain a sense of independence that will enable them to exercise their professional judgment independently and without bias.

And...

14.2 In order to comply with these two basic concepts, members of the profession shall: ...

14.2.5 Strive to continuously improve their knowledge of applicable planning theory and practice;

And...

14.6 The Planner’s Responsibility to the Profession and Other Members: A member shall:

14.6.1 Maintain an appropriate awareness of contemporary planning philosophy, planning theory and practice by obtaining professional education throughout their planning career, including compliance with the Institute’s continuous professional learning requirements;

Quick Facts:

Key CPL Program Information for Professional Planners

Below is a list of the essential information professional planners need to know regarding PIBC’s Continuous Professional Learning (CPL) program:

- The CPL program first started as of October 1, 2003.
- CPL reporting requirements apply to all active professional members of PIBC. That includes all Certified members (Registered Professional Planners or RPPs), all practicing Fellows (FCIPs), and all practicing Candidate members. Non-professional members (such as Student members, Pre-Candidates, Retired members, Honourary members, etc.) are exempt from the CPL requirements and are not required to report.
- CPL reporting periods are aligned on an annual calendar year basis (January 1 to December 31). The annual CPL reporting deadline is therefore Dec. 31st of each year. Members are encouraged to report their CPL activities throughout the year, as they complete activities, and are required to complete and submit all required CPL reports by the deadline each year.
- Two types of learning activities are recognized within the CPL program: Organized & Structured activities (those more formally structured learning opportunities typically organized and delivered by an external provider) and Independent & Self-Directed activities (those less formal learning opportunities

personally pursued by members themselves). Members can undertake and report both types for credit (within the guidelines and limits outlined elsewhere in this guide).

- CPL activities are measured using “Learning Units” (LUs) which, for most types of activities – typically correspond with the number of hours of active learning engaged in for each activity, rounded to the nearest quarter hour (15 minute) increment. In some cases, particularly for less structured activities, guidelines for the assignment of Learning Units are provided (as outlined elsewhere in this guide).
- The total required number of LUs to be undertaken and reported by members for each reporting period is 18.0 LUs — including a *minimum of 9.0* LUs of Organized & Structured learning activities (as more fully defined elsewhere in this guide). Members can also only receive credit for a *maximum of 9.0* LUs of Independent & Self-Directed learning activities per year.
- Members report their individual CPL activities and applicable Learning Units online, using the Institute’s online membership system (accessed through the PIBC website, using members’ existing email address login and password). Members can login online to report and review their CPL activities at any time.
- In recognition of the fact that members’ access to organized activities can sometimes vary from year to year, members may carry up to 9.0 LUs of excess Organized & Structured activities forward for credit in the *next subsequent reporting 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 activities) do not need to be reviewed in advance or pre-approved by PIBC in order to count for credit. Members are free to pursue and undertake appropriate CPL activities. Occasionally, PIBC will review and pre-assign Learning Units to some activities in advance (particularly PIBC CPL activities), but this is simply for convenience and for the information of members (it is not required for an activity to count for credit).
- Due to the range and diversity of different types of planning work planners engage in, learning activities do not necessarily need to be directly related to traditional land-use planning to count as acceptable CPL activities that can be reported for credit. Provided an activity is, in some way, reasonably relevant to the day-to-day planning work of a professional planner – whatever area of planning they may work in – that member can report that activity for credit. Members are always encouraged to report any and all activities they reasonably believe might be relevant and might therefore count for CPL credit.

All About LUs: Professional Learning Activities and Learning Units

Learning Units

Continuous professional learning (CPL) credits for activities undertaken are recorded and reported as numeric Learning Units (LUs). For most straightforward, formal or structured learning activities, one learning unit LU is normally equivalent to one full hour (60 minutes) of active engagement in appropriate/ acceptable professional learning activity. For example: a two-and-a-half hour session of learning activity earns 2.5 LUs.

In some cases (such as for some structured activities like tours, and many independent self-directed activities like reading, independent research, volunteer work, etc.), where direct allocation of LUs by time is difficult, or not appropriate, approximate equivalent values and guidelines will apply. Refer to later sections in this guide for more detailed information and examples of how to report LUs for these types of activities.

Professional Learning Activities

Professional learning activities for planners exist in any number of different formats, and are accessible from any number of sources and providers. Some activities may be in a typical class, workshop, or session presentation setting, but there are also many other diverse formats that provide professional learning. The CPL program is intended to accommodate and recognize all members’ diverse professional interests and the diverse learning resources available, to provide flexibility and access for all professional planners. Although the following list is not all-inclusive, it provides just a few examples of the variety of activities that can qualify for CPL credit.

- Board, committee or task force duties (professional and/or civic)
- Conferences & symposiums
- Credit & non-credit courses (from academic institutions or other providers)
- Distance education of varying forms
- Field trips, facility, or site tours
- Online courses, webinars & other digital learning
- Journal articles & publications (writing & critically reviewing)
- Lectures, seminars & workshops
- External teaching & research
- Workplace skills training & development
- Educational walking tours (guided or self-directed)
- Mentoring (either informal or formally structured)
- Volunteer service to the profession and/or community

And many more...

(Please see the appendices to this guide for some additional examples)

The purpose of professional learning activities is to actively engage members in furthering their knowledge, understanding, skills, and abilities, relevant to their growth & development as a professional planner. The idea is that members actively engage in all manner of such appropriate learning activities (organized and structured, and independently self-directed) relevant to their work as a professional planner, and be able to contemplate and reflect upon the new knowledge, skills, or abilities gained from each activity.

Please Note: In order to be accepted as valid CPL, an activity must be outside a members' day-to-day compensated professional work. However, this does not exclude special in-house workplace professional development or training activities outside of and beyond a member's normal professional work – such as an employer-organized in-house educational session.

Professional Learning & Requirements for Planners in Academia

Continuous professional learning for members who work in academic positions must be undertaken and reported in the same manner as for all other professional members, as outlined in this guide. Activities that are part of an academic member's day-to-day compensated work (i.e. regularly scheduled lecturing, teaching courses, academic administration etc.) may not be reported for credit. However, presentations, conferences, seminars, symposiums, workshops, volunteer work and other manner of activities that are not part of an academic member's day-to-day compensated work may be undertaken and reported for CPL credit.

Professional Learning Activity Categories

There are two broad realms of activities in which Learning Units (LUs) may be obtained and reported for credit: *organized & structured activities*, and *independent & self-directed activities*. This section provides additional explanation of the differences between the two types of activities and how to determine which category most typical types of learning activities would fall under.

Organized & Structured Activities

Organized and structured activities include any formally structured courses, meetings, seminars, lectures, presentations, workshops, sessions, or similar activities that are either provided by PIBC and its local Chapters, or organized and provided by another external third-party. Such third-party activities *may or may not be* endorsed in advance by PIBC – they need not be to count for CPL credit. These would include organized forms of distance education, organized and structured online learning activities, and more. Formal, structured mentorship or sponsorship of a Candidate member seeking professional certification can also count for credit for the mentoring/sponsoring Certified member. (Please refer to the next section for some examples of organized and structured activities).

Members are strongly encouraged to keep themselves informed of all PIBC CPL program offerings, as well as third-party activities endorsed by PIBC. Be sure to regularly check the PIBC e-News

newsletter and the PIBC website for the latest information. For activities endorsed in advance by PIBC, the number of LUs will normally be indicated and noted in marketing and promotion materials. On completion of a professional learning activity, members must still login online and self-report the activity and applicable Learning Units accordingly.

Members *must keep accurate back-up documentation* of all their professional learning activities attended or completed to help ensure there is no discrepancy in the recording process and to provide additional information to PIBC if and when required. Please refer elsewhere in this guide for more information about record-keeping requirements for CPL activities.

Independent & Self-Directed Activities

Independent and self-directed activities are activities that are generally not organized, structured activities, and are largely independently pursued by members. They are not normally endorsed in advance by PIBC, though guidelines for the assignment of applicable Learning Units (LUs) for some such activities are provided. To be eligible for credit, independent and self-directed activities must be in some way purposeful, must be educational and yield new planning or professional knowledge for the individual member, and be relevant and applicable to the individual members' practice of planning.

These are self-directed learning activities in which members independently engage. Activities in this realm can often provide support to the profession or civil society, as well as providing education to members. Examples are civic or professional committees (including the PIBC Board, committees, local chapters, or task forces, etc.). Additional volunteer activities that could count for credit might include teaching outside of normal professional work duties, independent research or self-designed learning experiences (such as self-guided tours, field study, etc.). Activities associated with members' day-to-day compensated employment responsibilities as a professional planner would not be acceptable for credit as valid CPL.

Regular, active volunteer participation in a relevant civic and/or professional committee or other relevant volunteer role (such as informal mentoring of students or others) may earn a planner up to 3.0 Learning Units per particular committee or volunteer role per year, to the collective maximum of 9.0 allowable independent & self-directed LUs (per year).

Additionally, critically reading and reviewing relevant articles and publications which further knowledge & encourage self-reflection or informal sharing of knowledge, or other self-directed individual learning (such as self-guided tours, relevant independent research, etc.) can also qualify for independent and self-directed LUs.

Reporting of Continuous Professional Learning Activities & Learning Units

To obtain learning unit (LU) credit for professional learning activities and meet the requirements of the CPL system, members

must login online and self-report their activity details and applicable LUs to PIBC each year. Members are *strongly encouraged* to report their CPL activities and LUs *throughout the year* as each activity is completed to ensure timely, accurate reporting and to avoid any reporting backlog at the end of each year.

Key information members will need to have before going online to submit their reported CPL activities and LUs include:

- The type of each learning activity (Organized & Structured, or Independent & Self-Directed), and
- The learning activity provider (the individual or organization who put on each activity or event), and
- The title or very short description of each learning activity, and
- The date of each learning activity (month, day, and year), and
- The number of applicable LUs for the activity (based on the calculation method(s) & guidelines outlined elsewhere in this guide).

When going online to report their CPL activities and LUs, members should visit the PIBC website and follow the links to the member login page. Members login using their PIBC username (email address on file) and password, and then use the online CPL reporting form to submit and report their CPL activities and corresponding LUs. Members can also view their current summary of CPL activities online.

Once logged in, members will find the CPL reporting link under the 'All About Me' section of the main 'My Member Console' home page. On the CPL page a summary of the member's CPL activities for the current calendar year will display, along with a button link to 'Add' new CPL activities. Members should click the 'Add' button to open up the online reporting form, then enter and save all the information about each of their CPL activities and applicable LUs. Once the information for an activity is entered, members can either 'Save' the activity, or can continue to report additional activities by selecting the 'Add another' button link at the bottom of the form.

In some cases, for many CIP and PIBC activities, members may be able to find them on searchable lists available through the online reporting form. In such cases the applicable activities can be selected and the information will automatically populate the fields of the online form accordingly. Otherwise, all the particulars of each and any activity can be manually entered into the applicable fields on the form and saved.

Members should use one entry for each event or activity. For any event or activity that was longer than one day, simply enter the date the activity was completed (i.e. the last day) of the event as the activity date. Members can mention the multi-day duration of the event or activity as part of the title or short description as well. Members should be sure to report the cumulative total LUs for the entire event or activity as part of the submission.

Please refer to the Appendix at the end of this guide for detailed step-by-step instructions on how to enter CPL activities using the online reporting form. Any members who encounter problems or have questions regarding submitting their CPL reports should contact the PIBC office for guidance and assistance.

Review and Acceptance of Reported CPL

All submissions are considered on an individual basis and are subject to review and adjustment of LUs assigned based on the Institute's CPL policies and guidelines. Assessments of the eligibility of members' reported learning activities and monitoring of members' CPL records will be conducted by PIBC staff with referral to the Professional Standards & Certification Committee as required for guidance and clarification. Again, members are encouraged to report their CPL activities and LUs on a continuous basis, preferably as soon as possible after each activity is completed.

Compliance

In accordance with the Institute's bylaws all professional members are required to comply with the continuous professional learning (CPL) and reporting requirements on an annual basis. Only in certain exceptional, limited circumstances may members have the requirements waived by the Institute upon written request. These include: members with certain membership status or within certain membership categories, as designated by the Board – including: Student members, Retired members, Pre-Candidates, Honourary members, and members formally granted leave from active membership – who are exempt from the requirements.

Individuals who are admitted as new Candidate members part way through a reporting period are exempt from the requirements for that first partial year, but must meet all requirements for the first full calendar year of membership after admission. For members who transfer in to PIBC from another professional planning institute elsewhere in Canada part way through a reporting period, PIBC will coordinate with that other institute to ensure ongoing CPL and reporting requirements are met. Also, PIBC members who wish to transfer their membership to another planning institute elsewhere in Canada will not be permitted to do so unless they are in compliance with their CPL reporting requirements.

Members who apply for, and are granted one-time waivers based on certain exceptional, limited circumstances are exempt from the CPL requirements for that particular year. Such exemptions may include medical leave, maternity or paternity leave, and other similar extraordinary circumstances, reviewed on an individual, case-by-case basis. Requests for any such one-time waivers *must be made in writing* to the PIBC office, in advance of the reporting deadline for the applicable reporting period.

The Institute will work cooperatively with members to assist them in meeting the requirements for continuous professional learning and reporting. The deadline for each reporting period is December 31st. Members who remain not in compliance with the requirements for the reporting of CPL for the preceding year as of January 1st will cease to be members in good standing of the Institute.

Between January 1st and June 30th of each year, such members may be reinstated to good standing by completing the necessary requirements for the reporting of CPL activities and LUs for the preceding year and payment of a penalty as set by the PIBC Board. Currently the penalties are: \$75 for members who late

report less than 18.0 of the required Learning Units after the January 1st deadline; and \$100 for members who late report all 18.0 required Learning Units after the January 1st deadline.

Serious matters of non-compliance will be referred to the Professional Standards & Certification Committee and the PIBC Board of Directors for action. Members who remain not in compliance with the requirements for continuous professional learning reporting for the preceding year after June 30th shall, after 14 written days' notice from the Secretary-Treasurer, have their membership in the Institute revoked.

Members who may have a disagreement with the Institute with respect to the receipt, assessment, and/or acceptance of their CPL activities, or any other related complaint may request, in writing, a review and reconsideration by the Institute's Professional Standards & Certification Committee. The Committee will review and reasonably consider such members' appeals in accordance with the Institute's bylaws, the relevant policies of the Institute, and the principles of reasonableness and fairness. The Committee will provide a written response to such members, outlining the disposition of the request, and the reasons for it. Decisions by the Committee with respect to CPL reporting, or any other related complaint, shall be final.

Professional Learning Activity Categories, Annual Requirements & Possible Topic Areas

As outlined previously, all Learning Units (LUs) earned through different activities are categorized as either Organized & Structured LUs or Independent & Self Directed LUs depending on the nature of the particular activity. Members are required to meet a minimum number of Organized & Structured LUs each year. Additionally, there is an annual limit to the number of Independent & Self-Directed LUs that can be reported for credit towards members' overall annual CPL requirements.

Annual Reporting Requirements & Limits:

9.0	Organized & Structured minimum
9.0	Independent & Self-Directed maximum
18.0	TOTAL Learning Units

A total of 18.0 LUs must be reported each year, including a minimum of at least 9.0 Organized & Structured LUs. A maximum limit of 9.0 Independent & Self-Directed LUs per year are eligible for credit. However, all required LUs could be Organized & Structured.

Additionally, recognizing that members' access to organized activities can sometimes vary from year to year, members may carry up to 9.0 excess Organized & Structured LUs forward for credit in the *next subsequent reporting 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 forward.

Possible Topic Areas for Continuous Professional Learning

To qualify as valid CPL for credit, a professional learning activity must encompass any topic areas that reasonably relate to members' varied & wide-ranging day-to-day professional planning work and responsibilities. The following is an alphabetical list of just a small sampling of potential subjects or topic areas that would qualify for PIBC CPL credit for most members. The eligibility of specific learning activities is ultimately based on the definition contained in Bylaw 1.1.13.

- Agriculture & land use
- Climate change mitigation & adaptation planning
- Communications
- Community planning & development
- Conflict resolution & mediation
- Data collection & analysis
- Demographics
- Development planning
- Energy & sustainability
- Environmental analysis
- Environmental impact & development
- Environmental & resource management planning
- Environmental law, regulation & policy
- First Nations & indigenous community planning
- Health & the built environment
- Heritage conservation
- Housing
- Infrastructure & asset management planning
- Land management & development
- Mapping & geographic information systems
- Official community plans
- Place-making & design
- Planning law, legislation, regulation & policy
- Policy planning
- Project management & planning
- Public process, engagement & consultation
- Regional planning
- Rural planning
- Site planning, design & analysis
- Social planning
- Transportation planning & mobility
- Urban planning & design
- Zoning & land use
- Workplace skills, training & development
- *And many other relevant topic areas...*

Examples of Some Eligible Learning Activities by Type:

Organized & Structured:

- Organized workshops, seminars, lectures or other learning sessions
- Formal education or training courses
- Special in-house workplace seminars, workshops, or courses (separate from day-to-day work duties)
- Workshops, sessions or presentations at PIBC and CIP professional planning conferences

- Workshops, sessions or presentations at any other relevant professional or educational conference
- Online webinars & distance-learning presentations
- Formal professional mentoring or sponsoring of a Candidate member going through the membership certification process
- Organized presentation of documentary films or other digital learning
- Researching & authoring relevant professional articles or books for review & publication

Independent & Self-Directed:

- Self-directed research or review of learning materials (e.g. literature, interviews, online resources etc.)
- Critical reading & review of relevant articles, books, or other publications
- Volunteer participation on a relevant civic, community, or advisory body, board, or committee (except those that are part of normal day-to-day work duties)
- Volunteer participation on a PIBC, CIP or other relevant professional board, committee, or similar role
- Self-guided educational walking tours or educational field-study activities
- Volunteering as an informal mentor to a student or other individual interested in planning (outside of the membership certification process for Candidate members)
- Self-directed review, research and/or analysis of relevant online resources, materials, or information

Guidelines for the Calculation & Assignment of Learning Units:

As indicated previously, members calculate LUs of professional learning activities by reporting the number of hours actively spent engaged in planning-related learning (rounded to the nearest quarter hour) with a minimum of 1/2 hour or 0.5 LUs for anyone professional learning activity. For example: a one hour and twenty minute lecture would equal 1.15 LUs. Or, an eight-hour full day workshop with a one-hour lunch break and two fifteen-minute coffee breaks would equal 6.5 LUs.

In some cases (such as for some less-structured/scheduled organized activities, and many independent, self-directed activities), where direct allocation of LUs by time is difficult, or not appropriate, approximate equivalent LU values or guidelines will apply. As guidance, please find below some examples of activities, in the two categories, with equivalent LU values assigned:

Organized & Structured Learning Activities:

- Attending a full-day guided tour, field study, or mobile workshop (where duration is at least 6 hours or more): 4.0 LUs
- Attending a half-day guided tour, field study, or mobile workshop (where duration is at least 3 hours but less than 6 hours): 2.5 LUs
- Attending a guided tour, field study, or mobile workshop (where duration is less than 3 hours): 1.0 LU

- Leading a full-day guided tour, field study or mobile workshop (where duration is at least 6 hours or more): 5.0 LUs
- Leading a half-day guided tour, field study or mobile workshop (where duration is at least 3 hours but less than 6 hours): 3.5 LUs
- Leading a guided tour, field study or mobile workshop (where duration is less than 3 hours): 2.0 LUs
- Volunteering as a formal mentor or sponsor for a Candidate member going through the membership certification process: 1.0 LU for each contact hour with Candidate member protégé to a maximum of 4.0 LUs per year
- Preparation of material for an organized lecture, workshop, seminar, presentation or conference session: 4.0 LUs
- Researching & writing a professional or academic article for review and organized publication: 3.0 – 6.0 LUs (depending on length/complexity)
- Researching & writing a professional or academic book/text for review and organized publication: 6.0 – 12.0 LUs (depending on length/complexity)

Independent & Self-Directed Learning Activities:

- Volunteer participation on relevant boards, committees, task forces, or other professional, civic/community volunteerism (outside regular work duties) for one year, with less than 5 hours of total meetings/work per year: 2.0 LUs
- Volunteer participation on relevant boards, committees, task forces, or other professional, civic/community volunteerism (outside regular work duties) for one year, with between 5 and 20 hours of meetings/work per year: 3.5 LUs
- Volunteer participation on relevant boards, committees, task forces, or other professional, civic/community volunteerism (outside regular work duties) for one year, with more than 20 hours of meetings/work per year: 5.0 LUs
- Critical reading/review of a relevant journal, academic, or professional article: 1.0 LUs
- Critical reading/review of a relevant academic or professional book, text or similar publication: 3.0 LUs
- Volunteering as an informal mentor to a student or other individual interested in planning (outside of the membership certification process for Candidate members): 1.0 LU for each contact hour with protégé to a maximum of 4.0 LUs per year
- Undertaking a full-day self-directed tour, field study etc. (where duration is at least 6 hours or more): 4.0 LUs
- Undertaking a half-day self-directed tour, field study etc. (where duration is at least 3 hours but less than 6 hours): 2.0 LUs
- Undertaking a self-directed tour, field study etc. (where duration is less than 3 hours): 1.0 LU

Questions?

Members that have queries about the eligibility status of activities, and or their equivalent Learning Units, are encouraged to contact the PIBC office for guidance or assistance.

Frequently Asked CPL Questions:

1. How do I report CPL activities and acquired Learning Units?

To obtain learning unit (LU) credit for professional learning activities and meet the requirements of the CPL system, members must login online and self-report their activity details and applicable LUs to PIBC each calendar year. Members are *strongly encouraged* to report their CPL activities and LUs *throughout the year* as each activity is completed to ensure timely, accurate reporting and to avoid any reporting backlog at the end of each year.

Key information members will need to have before going online to submit their reported CPL activities and LUs include:

- The type of each learning activity (organized & structured, or independent & self-directed), and
- The learning activity provider (the individual or organization who put on each activity or event), and
- The title or very short description of each learning activity, and
- The date of each learning activity (month, day, and year), and
- The number of applicable Learning Units (LUs) for the activity (based on the calculation method(s) & guidelines outlined elsewhere in this guide).

When going online to report their CPL activities and LUs, members should visit the PIBC website and follow the links to the member login. Members login using their PIBC username (email address on file) and password, and then use the online CPL reporting form to submit and report their CPL activities and corresponding Learning Units (LUs). Members can also view their current summary of CPL activities online.

Once logged in, members will find the CPL reporting link under the 'All About Me' section of the main 'My Member Console' home page. On the CPL page a summary of the member's CPL activities for the current calendar year will display, along with a button link to 'Add' new CPL activities. Members should click the 'Add' button to open up the online reporting form, then enter and save all the information about each of their CPL activities and applicable LUs. Once the information for an activity is entered, members can either 'Save' the activity, or can continue to report additional activities by selecting the 'Add another' button link at the bottom of the form.

In some cases, for many CIP and PIBC activities, members may be able to find them on searchable lists available through the online reporting form. In such cases the applicable activities can be selected and the information will automatically populate the fields of the online form accordingly. Otherwise, all the particulars of each and any activity can be manually entered into the applicable fields on the form and saved.

Members should use one entry for each event or activity. For any event or activity that was longer than one day, simply enter the date the activity was completed (i.e. the last day) of the event as the activity date. Members can mention the multi-day duration of the event or activity as part of the title or short description as well. Members should be sure to report the cumulative total LUs

for the entire event or activity as part of the submission.

Please refer to the Appendix at the end of this guide for detailed step-by-step instructions on how to enter CPL activities using the online reporting form. Any members who encounter problems or have questions regarding submitting their CPL reports should contact the PIBC office for guidance and assistance.

2. How will members' CPL and Learning Units be verified?

Members' CPL submissions and applicable Learning Units will be received and accepted in good faith, with random reviews and evaluations performed by the Institute through its Professional Standards & Certification Committee annually. Members *must keep* accurate records and supporting documentation or information of their reported activities on hand for at least the *most recent two calendar years* of CPL activity to avoid any potential issues with review and verification.

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

The primary objective of the CPL system and requirements is to encourage all professional members' ongoing education and professional development. Some form of required continuing professional development or education for professional practitioners is widely accepted as a minimum 'best practice' for most associations like PIBC. The PIBC is committed to helping members to be successful in completing their CPL requirements, through provision of regular offerings, including the annual conference, webinars, local chapter events, publications and regular information about all manner of third-party learning activities and events. The PIBC office will work with members to address minor concerns, to determine if a member requires assistance or is subject to special circumstances affecting their ability to complete the annual CPL requirements. However, serious or persistent non-compliance will be addressed in accordance with the Institute's bylaws, and the policies outlined in this guide.

4. Are there any exceptions/exemptions from CPL requirements?

Members may apply for and be granted one-time waivers based on certain exceptional, limited circumstances. Those granted such waivers are exempt from the CPL requirements for that particular reporting period. Acceptable reasons for such exemptions may include medical leave, maternity or paternity leave, and other similar extraordinary circumstances, reviewed on an individual, case-by-case basis. Requests for any such one-time waivers *must be made in writing* to the PIBC office, in advance of the reporting deadline for the applicable reporting period.

Additionally, members with certain membership status or within certain membership categories, as designated by the Board, are exempt from the CPL requirements. These include: Student members, Retired members, Pre-Candidates, Honourary members, and members formally granted leave from active membership.

5. What are the requirements for newly admitted members, or those who have transferred to PIBC from elsewhere?

Individuals who are admitted as newly Candidate members part way through a reporting period are exempt from the requirements for that first partial year, but must meet all requirements for the first full calendar year of membership after admission. For members who transfer in to PIBC from another professional planning institute elsewhere in Canada part way through a reporting period, PIBC will coordinate with that other institute to ensure ongoing CPL and reporting requirements are met.

6. Are Candidate members subject to the same CPL requirements?

Yes, as practicing planners Candidate members are required to meet the same annual CPL requirements as Certified members and practicing Fellows. While previously exempt, the requirement was rolled out for Candidate members starting in 2019.

7. I am also a member with another professional planning institute, in addition to being a member of PIBC. Do I have to report CPL to them as well?

Yes. Members who are active with more than one professional planning institute that has CPL requirements must appropriately report applicable CPL to each *institute* with which they hold membership and must meet the applicable CPL requirements for each. They can, however report and claim credit for the same activities undertaken. For example, if a member attended a conference worth 20.0 Learning Units, they can report participation at that same conference and the applicable Learning Units to each institute to which they belong for credit (so long as it meets the specific requirements and expectations of each institute). Members in such circumstances are strongly encouraged to keep up to date and carefully review the CPL requirements and procedures for each institute to which they belong.

8. Can you take the same course or learning activity twice for CPL credit?

Yes, as long as it is not within the same reporting period (year).

9. Can I exceed the annual requirement and carry forward acquired Learning Units?

Yes, but with limits. Recognizing that members' access to organized activities can sometimes vary from year to year, members may carry up to 9.0 excess Organized & Structured LUs forward for credit in the *next subsequent reporting 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 forward.

10. What kinds of providers of Organized & Structured activity are considered valid in terms of CPL?

Any number of organizations, groups and individuals may provide valid learning activities. Various providers of learning activities *do not need to be pre-approved or endorsed* by PIBC in

order for the activities they provide to count as valid CPL. While some may be reviewed and/or endorsed in advance, it is by no means a requirement that they be.

11. If a member does not work in traditional 'land-use' oriented planning work, and all the activities they attend are not related to traditional 'land-use' oriented planning, does this mean that the member will be unable to report their activities for CPL credit, and unable to meet the 18.0 LUs required?

No. PIBC recognizes that many members do not do 'traditional' or typical 'land-use' planning work, and that, as professional planners, they engage in a very wide range of planning work (and therefore undertake a very wide variety of learning activities, covering a range of topic areas — many of which may be seen as non-traditional). The important thing to remember is that the learning activities should be reasonably relevant to the members' day-to-day professional work as a planner. While every submission is reviewed on a case-by-case basis, members are encouraged to *report all the activities* they feel might be relevant and acceptable for CPL credit.

12. Can my normal business, work or practice activities be submitted for CPL credit?

No. The intent is to acquire/investigate/explore new areas of information in addition to and outside the members' normal daily work or 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.

13. What about special in-house professional development seminars or events? Can they qualify for CPL credit?

Yes. This applies to either 'outside' consultants, presenters or industry representatives brought in by the employer, workplace, or firm; or information sessions organized and delivered from within the workplace or firm's own resources, to provide special workplace skills training, or specific professional development that is separate from normal day-to-day work activities.

14. Can I get credit for relevant volunteer work that I undertake?

Yes. Relevant volunteer work related to members' professional planning work, including sitting on a PIBC committee or Board, serving as an examiner, mentoring or sponsoring a Candidate member undertaking certification, or other professional or community volunteer work can count and be reported as valid learning activities. Refer to earlier sections of this guide for details on how to calculate LUs for such volunteer work.

15. How long should I keep the paperwork supporting my CPL records?

We strongly suggest and encourage members to keep records and supporting documentation for learning activities reported for the current year plus the previous year (i.e. for the two most recent reporting periods or calendar years). Any CPL review of members' records will be undertaken no later than the year following any self-reporting of that member's learning activities.

APPENDIX:

Step-By-Step Instructions for Online Self-Reporting of CPL Activities and LUs:

PIBC utilizes an online database to store and track all member CPL reports. Members are directed to report their CPL activities and Learning Units (LUs) online, through the members-only section of the PIBC website, or the CIP national website (using the online CPL Reporting Form available there).

Members can also use this feature to check on their previous and current CPL activities as reported. All CPL activities and LUs reported are entered into the online database and are available for review. You will need your Member Login (email address & password) to access the online database.

Step 1:

Visit the Members section of the PIBC (<https://ams.pibc.bc.ca/>) or the CIP (<https://ams.cip-icu.ca/login>) website.

Step 2:

Login using your Member Login. You will need your username (your current email address on file with PIBC) & password.

If you don't know or can't remember them, you can use the 'Forgot Password' link for assistance. Or alternatively, you will need to contact PIBC: Tel: 604-696-5031, Toll-free: 1-866-696-5031 or email: info@pibc.bc.ca

Step 3:

Once logged in, you will be on the main member console home page. From there click on the 'CPL Activities' link at the bottom of the "All About Me" menu on the left. This will take you to the CPL reporting section.

Step 4:

(1) To enter a new CPL activity and LUs, from the 'CPL My Activities' page, click the 'Add' button to enter your individual Learning activity reports.

(2) To enter a CPL activity, first select whether it is an 'Organized & Structured' or 'Independent & Self-Directed' activity at the top of the form by clicking the appropriate button (if you are unsure for any particular activity, refer to sections elsewhere in this guide for assistance).

(3) If you are reporting activities from the CIP conference, activities from the PIBC (Home Affiliate) conference or other PIBC events, or events from Other Affiliates (i.e. other planning institutes elsewhere in Canada), you can scroll through the appropriate drop-down menus and click to enter one of those activities automatically.

When selecting an activity from a drop-down menu, the Provider, Description of CPL Activity, Activity Date and Learning Units fields auto-populate with the required information. Depending on the activity you select, some fields may not auto-populate (such as the number of LUs), but you can manually enter that information into the field.

Please note: some events may not be listed in the drop-down menus when you login to enter them, as the lists are only updated every few months. But you can always manually enter any and all of your CPL activities by following the steps below. Learning activities offered by third-parties (i.e. not CIP, PIBC or other planning institutes elsewhere in Canada) are not included in any drop-down menus, as doing so would make the lists too long and cumbersome for members to search for a particular activity.

(4) Enter the provider of the activity in the 'Provider' field lower down on the form (if it is an Independent & Self-Directed activity without an external provider, you can just enter 'Self' as the provider).

(5) Enter the activity title and/or short description by typing it in the 'Description of CPL Activity' field lower down on the form.

(6) Enter the date the activity occurred (for single-day activities) or the date it was completed (for multi-day activities) in the 'Activity Date' field, also near the bottom of the form.

(7) Enter the Number of Learning Units (LUs) being reported for the activity in the 'Learning Units' field at the bottom of the form (if you are unsure how to calculate the number of LUs for the activity, refer to sections elsewhere in this guide for assistance).

(8) Finally, click the 'Save' button to submit your completed report for the learning activity.

Please note: depending on the number of people logged into the online database, it may take a few seconds for the system to save the activity and let you enter additional activities. *Do not click the back button on your browser*, or close the browser window while it is saving, as it may cause the activity to inadvertently save multiple times or not at all.

You can enter and submit more than one activity at a time by selecting the 'Add Another' button at the bottom of the form, and entering the information for the additional activities as described above. Just be sure to save the form to submit the information.

Also please note: On the CPL 'My activities' page the summary information for reported CPL activity only shows activities and information for the *current or selected* CPL year. The default will always be the current reporting period (year). To switch to a different reporting period select the year you want to view using the drop down menu on the right, near the top of the 'My activities' page.

Questions?

Members that have queries about the eligibility status of activities, and or their equivalent Learning Units, are encouraged to contact the PIBC office for guidance or assistance.



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