

**- INTERIM -**

# **Continuing Education for PIBC Members: Mandatory vs. Voluntary Certification**

An Interim Report of the Planning Institute of British Columbia  
Task Force on Continuing Education and Professional Development

Prepared by the Task Force on  
Continuing Education and Professional Development  
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# 1. INTRODUCTION

The education of future planners and the ongoing education of practitioners, are important concerns of a professional planning institute. Minimum educational standards and programs to encourage ongoing education and professional development enable a professional organization to ensure that the services its members offer meet high standards of competence, quality and relevance. Professional standards and programs for continuing education also ensure that practitioners remain current and up-to-date, with the latest knowledge and skills necessary for sound professional practice.

On May 10, 2000, PIBC Council passed a motion establishing a one-year *Task Force on Continuing Education and Professional Development*, to consider the continuing education requirements of the Institute, and present a discussion paper to the 2001 PIBC Annual General Meeting on its findings and recommendations. This direction stemmed from discussions by the Education Committee on ways to assist PIBC in advancing the professional development of members and students. The Education Committee concluded that a number of issues faced the profession that warranted a closer look, with an aim to developing an overall PIBC position and policy on continuing education and the profession.

## 2. BACKGROUND

The Task Force had two tasks:

1. To investigate trends and directions in continuing education and professional development, focusing on what other professional planning and related professional organizations require with regard to continuing professional development; and,
2. To prepare a discussion paper on the subject of continuing education and the profession, outlining the research findings and setting out alternate courses of action, for consideration by the PIBC membership prior to the paper's introduction to the June 2001 AGM in Prince George.

Publication of a report prepared for the Task Force by Steven Dang on the PIBC web-site entitled, *Current Trends in Continuing Education and Professional Development* completed the first task.

This research was followed-up with discussions between the Task Force and representatives of seven other professional organizations regarding their initiatives in this area, including:

- Appraisal Institute of BC;
- Real Estate Institute of BC,
- BC Institute of Agrologists,
- Architectural Institute of BC (AIBC),
- BC Society of Landscape Architects (BCSLA),
- Building Inspectors Association of BC, and
- Association of Professional Engineers and Geoscientists of BC (APEGBC).

All of these organizations have in place, or are working to implement, either voluntary or mandatory programs for continuing education and professional development, tied to guidelines or standards of competency and professional practice.

The discussion that follows reflects the research findings and the Task Force's deliberations, in light of its dialogue with other professional organizations.

### 3. CONTEXT FOR THE DISCUSSION

The Canadian Institute of Planners and PIBC have little experience with formal continuing education and professional development programs. At the national level, CIP operates a voluntary certificate program for continuing professional development with a very low participation rate. Only about one hundred members of CIP have received a certificate in the past five years (Dang, 2000). Appendix A summarizes CIP's program. Of provincial affiliates, only l'Ordre des Urbanistes du Quebec (OUQ) is considering its own mandatory continuing education program.

In the United States, the American Planning Association (APA) maintains a voluntary certificate program similar to CIP's with a participation rate below 10% of its members. In 2001, APA plans to consider mandatory continuing education pilot programs in some selected states. According to Dang (2000), in the English-speaking world, only in Great Britain has there been a long standing, continuing professional education program for professional planners. The Royal Town Planning Institute (RTPI) reports that its program has been very successful in maintaining professional standards and enhancing the public profile of its members.

Dang (2000) found that of those organizations moving toward a mandatory scheme of continuing education, the following reasons were cited: obligation to public safety and service, quality control, enhancement of professional profile, and to address public concerns regarding professional practice.

### 4. WHY WE NEED CONTINUING EDUCATION AND PROFESSIONAL DEVELOPMENT

Most professions have formal, structured approaches to on-going professional development. For many, demonstrated continuing education is a requirement of maintaining professional certification or licensure. In the absence of statute-based certification or licensing requirements, the reasons for a practitioner to invest in continuing education and professional development may not be self-evident.

Arguments in favour of making an ongoing investment in continuing education can come from at least three perspectives:

**From the Perspective of the Individual Practitioner** investing in continuing education and ongoing professional development provides, among other things, the opportunity to learn things missed during college or university, or to study topics that are brand new. It enables the practitioner to stay current with new knowledge and emerging fields beyond the traditional core of expertise. It also allows one to keep abreast of topical issues of public concern and remain competitive in the job market. Not the least reason is that continuing education can refresh a professional who has grown stale, renewing enthusiasm for the field and the interests that brought one into the profession in the first place.

**From the Perspective of the Professional Institute**, investing in the continuing education and development of its membership permits it to maintain and expand the domain of practice over which it asserts professional competency. Professional development is critical to ensuring greater acceptance of the profession by citizens, allied professionals, elected officials and other decision-makers. It fosters confidence in the quality of professional services provided by members of the institute, increasing awareness and credibility that will provide greater individual and collaborative opportunities to members. It demonstrates good business and professional sense to have a membership with the most current knowledge and expertise possible.

**From the Perspective of the Public Interest** society at large benefits from professionals who can provide expertise based on current knowledge and the highest standards of professional practice. Public and private organizations are able to make valid claims to having done due diligence when the

professionals they employ or retain are continually upgrading their knowledge and skills. Continuing education and professional development shows prudent concern for the public interest, in a civil environment characterized by intense, informed and capable public scrutiny of all assertions of professional expertise.

## 5. WHY WE NEED A CERTIFICATION PROCESS

The ever expanding practice of planning and the rapidly changing social, economic and environmental context within which planners work requires that professional planners are up-to-date and knowledgeable about their particular specializations and have a solid understanding of the broader context of their work. What Maureen Garland (2001) asserts for Professional Agrologists holds equally true for Professional Planners. By adhering to initial educational standards and committing to professional development that encompasses continuing education and other aspects of lifelong learning, planners will have the knowledge, skills and professional competencies necessary to meet new challenges and opportunities.

Scrutiny by other professional bodies and citizens demands that planners maintain the highest standards of knowledge and competence. These standards can be made manifest through a certification process that assures an identifiable level of competence and professional standing.

## 6. WHAT CERTIFICATION IS BASED ON

Organizations asserting professional status for their membership must satisfy three standards:

**Educational Standards** - members must meet minimum educational standards and other credentialing criteria to achieve professional status. For members of PIBC these include:

- Provisional membership in CIP
- Two to six years of responsible professional planning experience witnessed by a full Member of CIP
  - 2 years** with a CIP recognized degree in planning (see Volume 3 of the *CIP Membership Manual* for a list of the issues and content that a university planning program must address to gain CIP recognition, summarized in Hornell, 1999)
  - 4 years** with a university degree in a related field
  - 6 years** with a university degree in a non-related field
- with a recognized degree, a written examination or a review of a portfolio of work
- with less than two years of responsible Canadian professional planning experience, a separate written examination on the Canadian planning system
- an oral examination on ethics and professionalism

(for more information go to [www.cip-icu.ca/English/members/become.htm](http://www.cip-icu.ca/English/members/become.htm))

**Standards of Conduct** - members are expected to conduct themselves consistent with a code of conduct. Members of PIBC must adhere to a code of conduct and values that includes standards related to:

- The Planner's responsibility to the public interest;
- The Planner's responsibility to clients and employers; and,
- The Planner's responsibility to the profession.

(for more information go to [www.cip-icu.ca/English/members/conduct.htm](http://www.cip-icu.ca/English/members/conduct.htm))

**Professional Standards** - members must make a commitment to professional development, an on-going process of personal growth that involves developing higher levels of two kinds of competency:

- 1) Broad, diverse and generic knowledge, including keeping up on current issues; and,
- 2) Specialty and disciplinary expertise.

CIP's self-evaluative continuing professional development program identifies work experience, education courses and training programs, professional activities, and personal development as areas in which planners should try to maintain recommended minimum standards (see Appendix A).

Of these three standards, those for education and conduct are currently mandatory and must be satisfied by all those certified as full members of CIP. Only standards related to professional development are voluntary. However, if PIBC, CIP and their members wish to gain full social recognition as professional organizations and as professionals, should the process of professional certification be completed by introducing a requirement for mandatory continuing education and professional development? If not, why not?

## 7. VOLUNTARY CERTIFICATION PROCESS

As previously stated, developing, maintaining and improving the competency of professionals throughout their careers is a principle held by many professional bodies. Many of these organizations have discussed whether participation in continuing education professional development should be mandatory for the maintenance of their members' professional certification or license to practice, or whether it can be a voluntary adjunct. Thus far, planning institutes and organizations in the English-speaking world (with the notable exception of RTP1) have been satisfied with voluntary, self-evaluative approaches.

### Arguments For:

- Allows members to learn at their own speed and in balance with other life demands;
- Does not impose a financial hardship on members or their employers beyond what they are willing to bear; and
- Affords members the freedom to choose the mode of learning and level of participation they prefer;
- Many members are already fulfilling at least some of the recommended standards;
- No resources are required for monitoring, evaluating and certifying programs or individual results; and
- Limits the responsibility of PIBC or CIP to administer the program.

### Arguments Against:

- No means of ensuring that the membership stays current and that skills do not become obsolete;
- No effective means to demonstrate that membership in CIP means more than simple possession of a university degree related to planning;
- Ensures that PIBC will not be seen as a true professional organization, nor its members as full professionals equal to others;
- Leaves PIBC's assertions of professional competence and authority over a certain domain of practice open to question; and
- Prevents the establishment of ever improving standards of professional practice and competence.

### Implications:

Staying with a voluntary, self-reporting system of professional development means no change to current practice and no additional demands on the resources of PIBC, CIP and individual members. The professional certification process will remain incomplete. That is, while there are mandatory requirements for education and professional conduct, PIBC will not be able to demonstrate that established standards of professional competence are being maintained or improved within its membership. PIBC will not actively review members' qualifications and/or issue new certificates to practice.

## 8. MANDATORY CERTIFICATION PROCESS

Brian Hart (2000) cites a 1992 discussion paper on mandatory continuing education published by the Professions and Occupations Bureau of the Province of Alberta. This paper reported increasing public concerns about professional competence due to the risk involved in obtaining services from an incompetent professional, and the feeling that service quality is not consistent with price. Professional obsolescence was raised as a related concern, which arises from the development of new knowledge, technologies and processes. A professional's competency can rapidly decline from the level it was at upon graduation and initial training. Increasingly, the public and decision-makers believe that protection of the public interest requires greater oversight and review of professional organizations to ensure that minimum standards of practice are met. In some jurisdictions in the United States, state licensing boards have imposed mandatory continuing education requirements on resistant professions.

### Arguments For:

- Ensures that minimum standards of knowledge and skill are maintained;
- Allows the profession to maintain and raise the standard of professional competence;
- Voluntary participation is limited and inadequate to satisfy one of the three standards of a profession;
- Increased confidence on the part of the public and decision makers and greater prestige of the profession;
- Many individuals and organizations are already investing in education and professional development;
- *Registered Lifelong Learning Savings Plans* provide individuals with a tax-sheltered way to invest in continuing education.

### Arguments Against:

- Difficult to force learning on unwilling participants;
- May lead members to resent the program;
- Could result in increased costs to the individual member or their employer;
- Currently no reciprocal requirements of other CIP affiliates or at the national level;
- Administrative burden of implementing a mandatory program on PIBC;
- Attitudes & Program Quality – participants who are “going through the motions” may not achieve real competency gains; and
- May result in a narrowing of PIBC's membership base and less outreach to allied fields.

### Implications:

Moving to a mandatory professional development program would require developing an administrative model for the program, and establishing the capacity either at the PIBC or CIP National level (or through a contracted third party) to deliver, monitor and maintain the program. Individual members would have to make a conscious effort to monitor and report on their professional development activities on a regular basis. A mandatory program could establish the groundwork for any future PIBC efforts to obtain statute-based professional recognition, including perhaps statutory licensing and re-certification requirements.

## 9. SUMMING UP AND FOR THE MEMBERSHIP'S CONSIDERATION

At present, interest in developing mandatory continuing education programs appears low among most provincial planning organizations (with the exception of OUQ). As Dang (2000) points out, most provincial affiliates are concerned with providing basic continuing education opportunities, capturing and maintaining membership, and pursuing an increased professional profile by other means.

On the other hand, the Task Force has found that mandatory continuing education as a condition for professional membership appears to be the trend in British Columbia. Most recently, the Architectural Institute of BC has adopted a mandatory continuing education program.

If a mandatory program is something PIBC members would like to explore further, those organizations that have, or are considering, mandatory programs identify several factors for success. These include:

- a broad definition of "continuing education";
- simplicity of reporting and administration;
- gradual phase-in requirements; and
- stronger legislative protection of the right to practice.

**Closing Statement:**

Existing voluntary programs offered by CIP and the American Planning Association (APA) have had limited participation and success. Sister professions such as the AIBC, BCSLA, APEGBC, APA and the OUQ have, or are developing, mandatory programs of continuing education. A review of PIBC policy on continuing professional development is timely.

**Recommendation:**

The Task Force therefore recommends that it be authorized to seek the response of the membership to this interim report and develop recommendations for a PIBC policy on continuing professional development for presentation to the 2002 Annual General Meeting.

## REFERENCES

Dang, Steven R. 2000. *Current Trends in Continuing Education and Professional Development*. A Report for the Task Force on Continuing Education and Professional Development of the Planning Institute of British Columbia. [www.pibc.bc.ca/PIBC\\_Continuing\\_Education\\_Repor.PDF](http://www.pibc.bc.ca/PIBC_Continuing_Education_Repor.PDF).

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Hart, Brian G., MAIBC, FRAIC, MCIP, AIA. 2000. *Mandatory Continuing Education/Continuing Education System: A Proposal for Implementation of a Mandatory Continuing Education Program for the Architectural Institute of British Columbia*. A Discussion Paper for the MCE Task Force for the Professional Development Board, November 6, 2000.

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# APPENDIX A

## CIP Continuing Professional Development Program

Contact CIP at 1-800-207-2138 in Canada or write us at: 116  
Albert Street, Suite 801, Ottawa ON K1P 5G3,  
Phone: (613) 237-PLAN (7526), Fax: (613) 237-7045  
e-mail: general@cip-icu.ca

### 1. Definition

The following activities comprise Continuing Professional Development:

- Work experience
  - Full time equivalent work in a planning or planning-related field
- Education courses and training programs
  - Formal programs intended to increase planning knowledge and to upgrade skills
- Professional activities
  - Various activities intended to enhance professional practice
- Personal development
  - All of the above in a non-planning field

### 2. Self Evaluation System

It is recommended that members meet a standard of 20 points over a 2-year period accumulated as follows:

Categories	Minimum	Maximum
1. Work Experience	6	12
2. Educations Courses and Training Programs	0	12
3. Professional Activities	0	8
4. Personal Development	0	4

#### 1. Work Experience Credits

It is recommended that, as a minimum, a professional planner must practice the equivalent of 6 months of full-time-equivalent work in any 2-year time frame to maintain professional competence. Employment must be in the field of planning or a closely related field and can include public sector practice, consulting, research, and teaching. Claim a maximum of 12 points/minimum of 6.

POINTS:

- Full time employment (approx. 150 hrs p/mth): 1 point per month
- Part-time employment: calculate the equivalent based upon number of hours

## 2. Education Courses and Training Programs

For the successful completion of substantive courses in planning or planning related fields and programs that promote the upgrading of planning skills, a member can claim points as follows to a maximum of 12.

POINTS:

- Full contact day: 1 point where a contact day is defined as a minimum of 6 hours (e.g. a 12 week/3 hours per week course yields 6 points) (e.g. a 3 day training program yields 3 points)

## 3. Professional Activities

DEFINITION

The following activities comprise Continuing Professional Development:

- Work experience (full-time-equivalent work in a planning or planning-related field)
- Education courses and training programs (formal programs intended to increase planning knowledge and upgrade skills)
- Professional activities (various activities intended to enhance conferences, seminars, workshops, presentations, lectures, literary contributions and service to the planning profession.

A maximum of 8 points can be claimed as follows:

POINTS:

- Attending conferences, seminars or workshops: 1 point per day
- Presentation or lecture to professionals, colleagues, or planning students: 2 points
- Presentation or lecture to lay public: 1 point
- Sole author of technical or research article: 4 points
- Contributing author of technical or research article: 2 points
- Abstract or book review: 1 point
- Position paper: 2 points
- Book published (sole author): 8 points
- Contributing author or editor of published book: 5 points
- Teaching a planning or planning-related course at post-secondary level: 2 points
- Service to professional association: 2 points per year
- Reading or self-directed study: 1 point per day
- Study tour or planning-related travel: 1 point per day

## 4. Personal Development

For all of the categories listed above, if these activities are undertaken in non-planning related fields or in service to the community, points may be claimed to a maximum of 4.

Points:

- half of those outlined above under Professional Activities.

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