

Top 10 Mistakes Members make with CPL Reporting

/ Claire Negrin RPP, MCIP, and the PIBC Professional Standards & Certification Committee

Every year, Certified and Candidate PIBC Members are required to complete and report 18 units of professional development (including a minimum of 9 units of organized and structured learning) in order to maintain their membership in good standing. This is known as the Continuous Professional Learning (CPL) system. Every Provincial and Territorial Institute and Association (PTIA) in Canada requires CPL reporting and conducts reviews of CPL reports. This helps to ensure that planners nation-wide are staying current and continually improving their skills and knowledge.

The CPL reporting process is relatively simple: Complete an eligible CPL activity and report the activity and associated Learning Units (LUs) to PIBC. Every year, however, we can all occasionally make small (and sometimes big) mistakes in our CPL reports. To help ensure reports are completed correctly and that we are keeping up with our professional learning obligations, PIBC and the Professional Standards and Certification Committee (the Committee) conducts an annual review of Members' CPL reports.

In 2020, the Committee completed the review of 2019 CPL reports. A total of 55 members' reports, representing about 5% of reporting members, were randomly selected by PIBC for an anonymous, more in-depth review by Committee members. Of the 55 reports reviewed, 34 reports had no issues (which is great!), 3 reports had minor errors that did not require additional follow-up, and 18 reports required some additional information or further clarification. Through this process, the Committee and the members under review learned some helpful lessons and tips regarding CPL reporting. In an effort to pass this learning along, we have prepared a list of the most common errors.

10. Preparing and Delivering Content for Public/Professional Consumption is a Structured Activity

Reporting these activities as self-directed is a common mistake. Please know that these activities (such as delivering workshops, presentations, etc.) qualify as organized and structured, and that we appreciate those planners who are delivering educational opportunities for the rest of us!

9. Miscategorization of Volunteer Activities

Volunteer participation on boards, committees, and task forces is a valued activity, but remember that these are reported as unstructured independent and self-directed CPL.

8. Inaccurately Reporting Committee Membership Hours

Any planning-related committee of which you are a member (outside of regular work) is eligible for CPL reporting, including PIBC committees, local advisory committees, etc. But remember, there are annual maximums for such CPL credit:

< 5 hrs of total meetings/work per year: 2.0 LUs

5 - 20 hrs of meetings/work per year: 3.5 LUs

> 20 hrs of meetings/work per year: 5.0 LUs

7. Formal Mentoring of a Candidate Member is a Structured Activity

If you are mentoring a current Candidate Member as part of the formal RPP Certification process, you can claim and report this time as an organized and structured CPL activity, to a maximum of 4.0 LUs per year. However, if you are providing other informal, unstructured mentorship of a student or other planner, this activity is still highly valued, but considered an independent and self-directed activity for CPL purposes, and is also limited to 4.0 LUs per year.

6. Vaguely Describing Reading Materials

Sometimes there is just not enough information or detail reported...

Poor Example: "Read 3 Planning-Related Books"

Good Example: 3 separate entries

- "Read *Investing in Place* by Sean Markey, Greg Halseth, and Don Manson"
- "Read *Small is Big* by Michael A. von Hausen"
- "Read *Cities for People* by Jan Gehl"

Critical reading of a relevant academic or professional book is eligible for up to 3.0 independent and self-directed LUs each. Critical reading of a relevant journal, academic, or professional article (like this one) is eligible for up to 1.0 independent and self-directed LU (per article read).

5. Vaguely Describing Events or Sessions

Again, sometimes there is just not enough information or detail...

Poor Example: "Presentation Skills"

Good Example: "Attended 2hr 'Presentation Skills' workshop hosted by our communications department. Included tips/tricks and participants presented for practice and to receive input. I got roasted."

4. Structured Activities That Aren't Offered by PIBC or CIP Are Still Structured

Just because an organized event or activity isn't offered by PIBC or CIP, doesn't mean it isn't structured! For example, webinars, workshops, or sessions put on by other PTIAs (APPI, OPPI, etc.), provincial or federal governments, or any other third-party organizations (such as universities, the BC Not for Profit Housing Association, the BC Economic Development Association, etc.) are all eligible to be reported as organized and structured CPL.

3. Claiming Activities That Are a Part of Your Normal Everyday Professional Work

If you sit as a representative on a committee as part of your regular job or professional duties, you cannot report that for CPL credit. But if you volunteer on a relevant task force, committee, etc. outside of your regular work time, you can report that for CPL credit as noted above.

2. Reporting A Conference as a Single Activity (Rather Than Breaking Up Reporting by Session)

We are interested in the conferences you attended! So please report each individual session or activity within larger conferences that you attended as separate activities. This way we can ensure that the content is relevant and that the appropriate hours of learning are reported (remember, breaks and social activities don't count). Don't forget to report all of the excellent individual sessions you attended at the PIBC 2021 Annual Conference: North of Normal!

1. Waiting Until December 31 to Complete Your Reporting

It is far easier to report CPL activities and LUs throughout the year as they are completed. We strongly encourage such regular reporting as activities are completed to avoid the end-of-year reporting crunch – which is more likely to result in reporting errors and forgetting to report activities that were completed and should count for CPL credit.

In 2019, only Certified Members were required to complete CPL reports. In 2020, CPL reporting was voluntary for Candidate Members, and became mandatory in 2021. Members On-Leave, Retired, Pre-Candidate, Honourary, and Student members, as well as Public Subscribers are not required to complete and report CPL.

The Committee will begin the review of 2020 CPL reports this summer. Remember, the purpose of these annual CPL reviews is not to penalize members; it is to help the Institute maintain standards and to help members better understand the CPL reporting requirements.

For a detailed explanation of how to report CPL activities and Learning Units, please review the Continuous Professional Learning System Guide available on the PIBC website. Remember to refer to the guidelines and the annual maximums permitted for each activity, as well as the appropriate categorization of activities as either organized and structured or independent and self-directed. And if

you have questions, don't hesitate to contact PIBC.

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