Information for Certification Maintenance Providers

 TOOLKIT

This toolkit contains valuable information regarding the Certification Maintenance program. If you have a question, please e-mail CM provider customer service at AICPCM@planning.org.
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GENERAL INFORMATION

American Planning Association

The American Planning Association (APA) brings together thousands of people—practicing planners, citizens, elected officials—dedicated to creating great communities for all. APA is a nonprofit public interest and education organization committed to urban, suburban, regional, and rural planning. APA’s professional institute—the American Institute of Certified Planners (AICP)—provides leadership in professional development, ethics, and the standards of planning practice.

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American Institute of Certified Planners
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(p) 312-431-9100
(f) 312-786-6700

1030 15th St., NW, Ste. 750W
Washington, D.C. 20005
(p) 202-872-0611
(f) 202-872-0643

aicpcm@planning.org
www.planning.org

AICP Certified Planners

AICP-certified planners are members of APA’s professional institute, the American Institute of Certified Planners.

More than 15,000 individuals have demonstrated a commitment to high standards of professional practice and a mastery of theories and tools of planning. To become certified, an APA member must meet requirements for education and experience, pass the AICP Certification Exam, and pledge to uphold ethical standards and engage in ongoing professional development.

The AICP Code of Ethics and Professional Conduct helps certified planners uphold those ethical standards. AICP’s Certification Maintenance program helps certified planners earn 32 hours of professional development every two years.

Details about the AICP Code of Ethics and Professional Conduct are at www.planning.org/ethics/ethicscode.htm.

Details about the Certification Maintenance program are at www.planning.org/cm/.
PROGRAM OVERVIEW

What Is Certification Maintenance?
Beginning on January 1, 2008, all AICP members are required to engage in mandatory continuing education to maintain their AICP credential. AICP members must earn 32 Certification Maintenance (CM) credits, including 1.5 credits in both ethics and law, every two years.

The Certification Maintenance program links certified planners to education and training opportunities so they may earn those mandatory credits and remain current with the latest trends, technologies, and best practices.

What Are CM Providers?
Certification Maintenance (CM) Providers are organizations approved by AICP/APA to provide continuing education activities and events for CM credits. All education providers, including APA and its chapters and divisions, must apply to become CM providers.

APA/AICP markets all CM-approved activities through its online CM Search. Approved organizations are also included in the online directory of CM providers. It’s an opportunity to reach 15,000 professional planners who are looking for professional development activities such as conferences, workshops, lectures, or web-based training (i.e., online courses, webcasts, podcasts, etc.)

Who Is Eligible to Be a CM Provider?
Any organization that provides educational activities or products for professional planners can become a CM provider. These include (but are not limited to):
- APA Chapters and Divisions
- Nonprofit organizations
- Professional trainingservices
- Government entities
- Private firms or companies
- Universities and academic institutions

What Are the Benefits of Becoming a CM Provider?
Some benefits of being a CM provider include:
- Advertise your training on APA’s website viewed by more than 15,000 AICP members
- Inclusion in the online directory of registered CM providers
- Use of the CM logo in marketing and promotional materials
- Password access to online services, templates, provider dashboard, feedback from attendees offered through our automated event, and speaker rating mechanism
- Partnership opportunities with APA and its Chapters and Divisions
- Increased attendance at your educationalevents
- Ability to enter your non-CM eligible events—such as training for planning commissioners or the public—for promotion on the APA website as long as certain criteria are met (see page 11)

Provider Commitments
To ensure the quality of CM education for our certified planners, all organizations agree to uphold the following:
1. Providers shall provide all services competently. Providers shall not discriminate in the delivery of continuing educational activities or the conduct of research and scholarly courses on the basis of race or ethnicity, gender, age, religion, national origin, sexual orientation, or disability.

2. Providers shall not misrepresent the credentials of presenters, assistants, or personnel and shall inform those that are involved in the educational activities of the name of persons providing services.

3. Providers shall limit statements advertising, announcing, or marketing professional services or product promotion during the educational activity. A brief statement either at the beginning or end of the activity is permissible.

4. Providers shall ensure that their speakers reference the source when using other persons' ideas, research, courses, or products in written, oral, or any media presentation or summary.

5. Providers shall adhere to prevailing professional standards when referencing other professional entities, research results, and products.

6. Providers shall not demean any other provider and manufacturer by advertising, announcing, or marketing in any manner.

7. Providers shall not engage in dishonesty, fraud, deceit, or misrepresentation or any form of conduct that adversely reflects on the AICP CM provider system or on the profession of other manufacturers or AICP CM providers.

8. Providers shall ensure that information collected from AICP members shall be secure from unauthorized use.

9. Providers shall notify participants of any changes to the details of the event if it’s been changed from what was entered into and approved in the CMS system.

10. Providers shall not charge AICP members any additional fee for earning CM credits, for example registration or a separate fee.

11. Providers shall follow the following partnership guidelines:

   Providers are not allowed to share their assigned Provider Account Number with other agencies, firms, companies, organizations or individuals who are not approved by AICP CM to provide courses. AICP CM provider account numbers and approved status are solely for the purpose of providing high-quality continuing education to AICP members. By allowing others to use your provider number, the quality of the education provided is compromised.

An approved CM provider may be considered a primary partner in a program if the following conditions are met:

- CM provider has shared the total direct costs of the program (not including consumables such as food and beverages) OR the activity is marketed under the registered provider’s brand (i.e. logo);
- CM provider has contributed significantly to the development of the program (e.g., topic and speaker identification); and
- CM provider has participated in the marketing of the program
BECOMING A CM PROVIDER

There are three steps to becoming an approved CM provider:

1. Submit a completed **online application**
2. Be approved by AICP
3. Select and purchase a **payment plan**

**Step 1: Submit a Completed Online Application**

The questions in the **provider application** explore your organization’s ability to meet CM standards, which include relevance to planners and quality of delivery through:

- Topics
- Learning objectives
- Evaluation
- Participant Feedback
- Expert Speakers

**Step 2: Be Approved by AICP**

Provider applications are accepted for review at any time. The provider administrator is notified via email of the acceptance or deferral within 10 business days of application receipt.

If AICP defers an application, we will notify the administrator of the specific reasons and invite a revised application that addresses those concerns. The duration of the approval period will be based on the provider’s registration history.

Please refer to the following chart. Note: For an organization that never has been a registered CM provider, the “Period as a Registered CM Provider” is “New.” For a current or former registered CM provider, the “Period as a Registered CM Provider” began the year the organization was first registered.

<table>
<thead>
<tr>
<th>Period as a Registered CM Provider</th>
<th>Length of Provider Approval Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>New– 2 years</td>
<td>2 years</td>
</tr>
<tr>
<td>3– 4 years</td>
<td>3 years</td>
</tr>
<tr>
<td>Five or more years</td>
<td>4 years</td>
</tr>
</tbody>
</table>

Approval periods expire on December 31 of the associated year (please refer to the chart above). Provider fees are due annually, every January 1. Each October, APA will send a communication to providers as a reminder to purchase a payment plan for the upcoming calendar year.
Step 3: Select and Purchase Payment Plan

Once the provider application is approved, a provider will remain approved for a period of two, three, or four years. A copy of your approved application is available to view from your CM Provider Dashboard.

Selecting the right payment plan is an important consideration in becoming a CM Provider. Please think carefully about what works best for your organization’s educational needs. Please contact AICPCM@planning.org if you have any questions on choosing the right payment plan. Note: All provider plans are non-refundable. Annual ad-hoc provider plans may be upgraded to the annual unlimited plan at any time.

Payment Plan Types

There are two payment plan types: Annual Per-Credit and Annual Unlimited.

The Annual Unlimited payment plan is organized by organization type and size. An addition benefit of the Annual Unlimited plan is the $95 sub-group fee. Providers who purchased an Annual Unlimited plan and have "departments" or sub-groups within their organizational structure may choose to purchase a separate provider number for an additional $95 fee per sub-group. This allows each sub-group to share registration powers under one Annual Unlimited payment plan rather than being required to purchase individual Annual Unlimited payment plans. This option is limited to sub-groups that share either the same Tax ID (e.g., a planning firm with several locations, a division within an organization, a campus or department within a university, etc.) or fit within a governmental structure that recognizes a similar status (e.g., municipal departments or agencies).

All payment plans are active for a period of one year (January–December) regardless of when you become an approved provider. Details about the payment plan options and pricing are available at www.planning.org/cm/activities/payment/.

Credit card and check are accepted forms of payment.

If paying by check, please mail payment to:

American Planning Association
CM Provider
Lock Box 4291
Carol Stream, IL 60197-4291
CM PROVIDER DASHBOARD

The **CM Provider Dashboard** is where you access and manage your CM account and events. It includes the following types of information:

- Administrators, company logo, description, and last 4 digits of taxID number
- Approved application(s), and link to the CM Provider Toolkit
- Payment plan information
- Order history and receipt for order
- Event history, event and speaker ratings and comments, and event ID number

**Manage Your Account**

The dashboard has the following functionality to assist you in managing your account:

- Administrators. You can add or remove an administrator
- Company logo and description. You can add and edit your logo and description
- Application. Deferred applications may be edited and re-submitted from the dashboard. The approved application will be available for view as a starting point for future use.
- Fee Renewal. Link to renew your annual payment plan

**Manage Events**

Status indicators on the Provider Dashboard are meant to assist you in managing your CM events. Your event will be tagged with the following labels, depending on its status. Please see instructions for entering an event (page 9).

**Cancelled**

This event has been cancelled and has been removed from the **CM Search**.

**Not Entered**

This event has not yet been entered for CM review. If you wish to remove from your dashboard, please send an email to the APA staff at **AICPCM@planning.org** and provide the associated event ID number and title, in the subject “request to delete event from my dashboard.”

**Entered**

This event has been entered and is displayed as CM-approved on the **CM Search**. Entered events may be edited from your CM Provider Dashboard.

**Making a Change to Your Event**

CM providers may make changes to events that have not yet occurred and have been successfully entered. If you are making a change or canceling your entered event after the event date, you must request any changes by contacting APA staff at **AICPCM@planning.org**.

Note: Please re-enter a repeat event (an event held on more than one occasion or location) as a new separate event in the CM system by using the relist option on the event type options page. A dropdown list of your events will appear. Select the event you wish to repeat—the system will make a copy for you to edit and enter, leaving the original event unchanged.
CM EVENTS

Once you become an approved provider and purchased your payment plan, you may begin entering and publishing events to the APA website. As an approved provider, you are committed to ensuring that all events entered into the CM system uphold CM policies (see page 11).

All activities offering CM credit must be entered and published by the provider in order for attendees to their log CM credits for participation.

How CM Credits Are Measured

CM credits are measured in contact hours, so that 30 minutes of instructional time equals 30 minutes of CM credit (e.g., 30 minutes contact = 0.5 CM credits; 1.0 contact hours = 1.0 CM credits). An event must be at least 30 minutes in duration to be eligible for CM credit.

Non-instructional activities or breaks (i.e. bathroom breaks, etc.) cannot be included toward the contact hour(s) and should be discounted from your CM credits. Only instructional time is eligible for CM credit:

- Travel time for mobile workshops and tours will not count unless facilitated instruction is taking place on the trip.
- Time for participants to move between sessions should be taken into account when developing the event schedule and requesting CM credits.
- Award ceremonies that convey educational content or best practices (i.e., live explanations, PowerPoint slides, or video) are eligible for CM credit.
- Time spent watching a film is eligible for CM credit, as long as the content meets the CM criteria (see page 11).
- Facilitated book discussions are eligible and must meet the CM eligibility. Credit should not be given for reading the book, only the amount of time spent in the facilitated discussion.
- Credentialing exam preparation activities do not count for CM credit (e.g., architectural registration, LEED ND, and AICP).
- A career course is eligible and must meet the CM eligibility. Examples of eligible courses include conflict resolution with a focus on planning, and management with a focus on planning. It is not eligible when the course focuses on areas such as advanced excel training, general project management, or advice to planning their career or enhancing a resume.

Entering an Event

Events must meet standards of delivery and administration. Events qualifying for CM credit:

- Events are led by one or more subject matter experts. An expert is defined by AICP as a professional who has made a contribution to the profession through practice, teaching, research or publications; completed works that proclaim individuality and mastery of the principles of planning and whose work demonstrates outstanding quality and professionalism.
- Use learning methodologies and formats that are appropriate to the event’s educational purpose or objectives. Align professional development with AICP’s Core Competencies.
- Do not include proprietary information. Materials used during the CM credit portion of the event must be solely for educational purposes.
- Are at least 30 minutes in duration.
- Are timed in a manner that is consistent with the time for which the event was registered (i.e., an event lasting 75 minutes = 1.25 CM credits, an event lasting 90 minutes = 1.5 CM credits).
• Include an announcement notifying AICP members that their attendance is required for the duration of the event in order to receive CM credit.

• Remain unbiased and non-promotional in nature. Note: An organization’s services or products may be discussed prior to or after the completion of the CM credit portion of the event.

• Include an attendance log and event evaluation—administered by the provider and completed by AICP member registrants.

Step 1: Determine Event Type

When entering your CM event, be sure to select the proper type of event:

Single Event

A single event is a live in-person or live online event held one time on a specific date. Single events include workshops, lectures, symposiums, or webinars and webcasts. The participant and instructor are participating at the same time, and participants cannot choose among multiple activities. All participants at a single event attend the same activities and earn the same number of credits.

Multi-Part Event

A multi-part event is defined as a live event with multiple activities, such as a conference with several sessions or multiple registration options. Participants at a multi-part event choose between a variety of activities and a portion of the event and individual participants may earn different numbers of credits.

Note: If you choose this type, you will be asked to enter information for each of the individual activities available at the event that you would like to offer CM credit. The event will appear once on APA’s online CM Search; the individual activities will appear on the event’s detailpage.

On-Demand Education

Providers may seek CM credit for recorded educational products. The recorded products for CM credit allow the flexibility of quality training anytime and anywhere. The provider must include a link to the materials (i.e., PowerPoint, PDF presentation, survey, etc.) for this CM eligible product. APA National does not post materials or recordings to its website for registered providers.

On-demand education has additional criteria for CM eligibility. Please consider the following learning objectives before entering your product:

1. What evaluation tools are used to measure the efficacy of the event and speakers? How are those tools used to help make necessary changes to the content and delivery of the event?

2. How does the event integrate methods by which the learner acts upon the information and knowledge that has been imparted (e.g., asking questions of the course instructor(s), writing an essay, taking a test or quiz, completing a project assignment, etc.)?

3. How does the product use multiple methods of learning? Methods of learning include:

   • Text or course outline of course content
   • Plans
   • Photographs of case studies
   • Relevant graphics or other visuals
   • Audio lectures linked to PowerPoint presentation
   • Supplemental reading materials
Demonstrating Acquisition of Content
All CM-eligible activities must contain a mechanism for gauging acquisition of content. Methods will vary with the format of each activity, but some methods that have worked in the past are:

- Multiple choice tests
- Essays
- A question-and-answer forum
- Online discussion board
- Additional methods, as justified by the CM Provider

Copyright and Reproduction Permission
Course instructors will acknowledge the source of all materials. If the materials are owned by the instructor, this will be stated in the program. All other images, photographs, reading materials, handouts, etc. will each be acknowledged in the materials. The CM provider will keep copies of all copyright and reproduction permissions and provide them upon request to the APA staff during a CM review. The provider will also obtain a copyright agreement from the course instructor(s) and make them available to APA staff.

Step 2: Event Development

- Use the CM template for gathering information. Filling out the template saves time and ensures you gather the proper information.
- Ensure the substantive content of the event is complete. Once an event is entered and published on the APA website, the substantial content of the event cannot be altered. If substantial changes in content are made, the event must be entered as a new event—and the original event should be updated as canceled.
- Select an evaluation mechanism. CM providers are required to use evaluation mechanisms to assess each event or activity’s quality and relevance to its purpose or objectives. Click here for an example.
- Select a mechanism for recording attendance. Each CM event must include a mechanism of recording attendance for each AICP member, such as a registration list of attendees or a sign-in sheet. APA will conduct a review of provider records at the end of your approval period. If your event (e.g. conference) has several activities, one registration list will suffice—or example, providers are not required to have sign-in sheets at each session, but should retain a master list of all registrants. For on demand courses (products) the evaluation may serve as the record of attendance.
- Maintain verification records for two years. Should the providers be audited, they will need to produce participant sign-in information. Click here for a sample sign-in sheet.
- Register your event early. See instructions on entering a CM event (see page 15).
- Promote your event. See instructions on branding and publicizing a CM event (page 21). Please remember to enter your event early. Branding cannot be used in promotions unless the event has been entered.

Step 3: Content Considerations

CM Eligibility Criteria
When asked to describe the event or activity please address the following:

1. Be designed to meet a specific planning-related training objective. The educational purpose or objective must be clearly identified.
2. Be designed to teach subject matter in appropriate depth and scope for the following minimum level - a planner in current practice with at least four years of professional experience after earning a 2-year master’s degree in planning.
3. Address the demonstrated educational needs of AICP members as outlined in AICP’s Core Competencies

Non-CM Event Promotion
Special benefit for approved providers—you may enter your non-CM eligible events for promotion on the APA website as long as the following criteria are met:
1. You have an active provider registration for the calendar year the event is held
2. Education must include one of the following target audiences:
   a. Emerging Professionals: Planning education that does not meet the educational level of a certified planner
   b. Public Education: More basic than at a professional level for a certified planner.
   c. Planning Commission and Official Education: More basic than at a professional level for a certified planner.

**Speaker Information**
At least one speaker is required to enter an event. When entering a speaker, providers have the option to choose from APA’s speaker database or add speakers apart from APA’s speaker database.

**Choose from APA’s Speaker Database**
To choose from APA’s speaker database, enter the speaker’s name in the lookup to search APA’s contact list. If the search does not return a record for the person you named, you may ‘Add Speakers Apart from APA’s Speaker Database’ using the second option — manually enter the speaker name and bio.

**Star Rating**
Speakers in APA’s speaker database will receive a star rating, the same star-rating process used for the event during the CM logging process by AICP member participants.

**Add a speaker**

Choose from APA's Speaker Database

Enter the speaker's name below to search APAs contacts list. If the search does not return a record for the person you named, you may ‘Add Speakers Apart from APAs Speaker Database’ (below)

![Search for Speaker](speaker_search.png)

**Add Speakers Apart from APA’s Speaker Database**
If you do not wish to select from APA’s speaker database, please enter speaker information (first name, last name, and bio, the email field is optional). The speaker will not be included in APA’s speaker database and this information will not be automatically updated if the speaker updates his or her APA Profile.
Confirm Your Speaker

Click ‘Save and Add another Speaker’ or ‘Save and Continue’ to the next event entry step

Law and Ethics

Ethics

Activities offering CM ethics credit must focus on training planners on the standards of ethical behavior according to the AICP Code of Ethics and Professional Conduct. While general ethics courses, local ethics laws, and ethics codes from other professions can introduce relevant issues as well, the AICP Code focuses on a system of moral principles specific to professional planners. This may be accomplished using a variety of formats and techniques, including those presented in the APA Ethics Toolkit.

As a rule of thumb, ethics sessions should elicit self-reflection from participants and prompt them to consider how they might react to a situation or scenario. Ethics scenarios are rarely "cut and dried," and the most effective ethics sessions challenge participants to view a situation from a variety of perspectives, taking into consideration several variables.

Because the Certification Maintenance program requires 1.5 credits of ethics per reporting period, when planning ethics session, consider offerings of at least 90 minutes. This consideration would be appreciated by AICP attendees, so that one session is all that is needed to meet the requirement.

If an ethics session includes breakout groups, to receive CM ethics credit, each breakout group must be facilitated by a presenter experienced with the code who is prepared to guide the group and speak authoritatively on the topic of ethics. Group size should remain relatively small, and therefore, facilitated breakout sessions may be difficult to conduct in very large groups. Given logistics, a session that includes breakout groups must subtract 15 minutes from the length of the session in calculating the CM credit. For example, in order for a session that includes breakout groups to deliver 1.5 CM credits, the session must last 105 minutes.

A session can qualify even if it focuses on aspirational principles (or other parts of the code) rather than rules of conduct. Ethics sessions are not required to cover the code comprehensively (and probably shouldn’t try, unless they are a longer format) but should focus on some aspects of it and get into more depth.
To what extent does a session have to deal with specifically planning issues to qualify? It should have a significant focus on relevant examples of ethical behavior, based on the principles described in the Code of Ethics. Ethics training for elected or appointed officials is not eligible for CM credit.

Organizers should use the *Ethics in Planning: A Toolkit for Conducting Ethics Sessions* as a reference to craft a training that best meets the size, goals, and learning styles of their audience.

**Law**

Providers must demonstrate that the content of the activity is related to planning law, such as environmental law, land use law, redevelopment law, administrative law, housing law, etc. Activities submitted for law-credit CM approval must be closely related to recently enacted planning laws or recent (recent is defined as within the last 10 years) case decisions or trend in existing planning laws or case decisions. Training on law must constitute a majority of the content of the activity.

**Short, Timed Presentation Sessions**

These presentations are short—often 6 or 7 minutes—and are accompanied by a timed set of slides—often 20-25 slides. The format encourages presenters to be concise and creative, and to offer a perspective or insight on planning that may depart from a traditional presentation in panel session.

To obtain CM credit for these sessions:

1. Must meet the [CM Eligibility Criteria](#) (see page 11)
2. Topical themes must be organized in 30-, 60-, 90- or 120-minute modules (e.g., “Retrofitting Suburbia” or “Public Engagement”).

**Unconference Event or Activity for CM Credit**

The following are guidelines for events and activities seeking CM credit for an “unconference” type of format.

**Recommendations, But Not Requirements**

- Social Media: Website and pre-event solicitation of ideas; Twitter, blogging, and a forum can all enhance the experience.
- Ignite Talks: Also called Lightning Sessions can be used to kick off the event and inspire thinking about the issues; experienced speakers from allied fields (i.e. technology) as well as engaged planners can make good presenters.

**Requirements**

AICP defines an unconference as: a participatory event in which attendees learn by shaping and leading the event as well as exchanging ideas with other individuals who have an earnest interest in the topic. Unconferences are eligible for CM credit as long as they:

- Meet the CM eligibility criteria.
- Maintain the CM standards of delivery.
- Are focused on one topic.
- Have an event theme. Must have some boundaries or departure point such as “transforming transportation.”
- Engage an expert facilitator. An expert facilitator who fits the AICP expert definition that is a person defined as an individual who has contributed to the field of planning through practice, teaching, research or
publications; has completed work that exhibits a mastery of the principles of planning; and whose work demonstrates a commitment to outstanding quality and professionalism.

- Enable active participation from attendees.
- Constitute a full or half day. The event should be no less than 3 hours and can be as long as 8 hours.
- Are peer-developed and driven.
- Have topics selected by those who attend.
- Are planned in advance. The general format must be decided in advance and some structure created so the event transpires in a meaningful way.

**Please note:** Only portions of these events are eligible for CM. Examples of non-instructional activities, ineligible for CM credit include: Breaks, lunch, panel selection, and welcome/orientation.

**Example of Schedule**
9:30 a.m.–4:30 p.m. = CM 4.0

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome and Orientation (no CM)</td>
<td>9:30-9:45 a.m.</td>
</tr>
<tr>
<td>Ignite Talks (CM)</td>
<td>9:45-10:15 a.m.</td>
</tr>
<tr>
<td>Panel Picking (no CM)</td>
<td>10:15-10:45 a.m.</td>
</tr>
<tr>
<td>Coffee Break (no CM)</td>
<td>10:45-11:00 a.m.</td>
</tr>
<tr>
<td>Table Time A (CM)</td>
<td>11:00-11:45 a.m.</td>
</tr>
<tr>
<td>Table Time B (CM)</td>
<td>11:45 a.m.-12:30 p.m.</td>
</tr>
<tr>
<td>Lunch (no CM)</td>
<td>12:30-1:30 p.m.</td>
</tr>
<tr>
<td>Table Time C (CM)</td>
<td>1:30-2:15 p.m.</td>
</tr>
<tr>
<td>Table Time D (CM)</td>
<td>2:15-3:00 p.m.</td>
</tr>
<tr>
<td>Coffee Talk (no CM)</td>
<td>3:00-4:00 p.m.</td>
</tr>
<tr>
<td>Wrap-up (CM)</td>
<td>4:00-4:30 p.m.</td>
</tr>
</tbody>
</table>

**Step 4: Entering and Posting an Event**

Use the Visual Tips on the following pages to learn more about the new features of event entry.
1. BASIC EVENT INFORMATION (top of event entry form)

**Single Event Live In Person - Event Entry**

- **TIP:** Start and End fields pop up in this box. Select dates and times.
- **TIP:** Time Zone drop-down select time zone where event will occur.
- **TIP:** Enter a web link that leads to more information about your event, i.e., registration.
- **TIP:** Events offering law and/or ethics CM credits. Consider offering the full 1.5 CM credit requirements.
- **TIP:** Choose up to three topics from the menu.

Next: Description of Event and Speakers
2. DESCRIPTION OF EVENT (middle of event entryform)

TIP: Use the buttons and menus above to format the text of your description to make it more readable. The buttons should look familiar from word processing and other programs. Copy and paste your text from a document or type it directly here. Use the "eye" button (circled above) to preview how your description will look before it's posted in the live CM Search pages on the website.

3. SPEAKERS (bottom of form)

TIP:
Read the instructions under each header.

Choose from these two options to add a speaker:

☑️ search for a name in APA's contact list
☑️ manually add speaker information.

Next: Provider Dashboard
1. Basic Provider Information

TIP: Add your company logo and manage provider description here. The logo and description will appear in your provider profile online.

TIP: Manage administrators here. Use the lookup to add additional administrators.

2. Provider Status and “Add an Event” Buttons

TIPS: View your provider status and view and print past provider applications.

View active payment plans and a list of partner organizations if any are linked to your EIN.

View and print processed orders.
3. View and Manage Entered Events

NOTE: Event numbers now start with "30" (e.g. 3001544). Activities within a multipart event now start with "4" (e.g. 4195117).

<table>
<thead>
<tr>
<th>TYPE</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Year and Forward</td>
<td>All</td>
</tr>
<tr>
<td>Past</td>
<td></td>
</tr>
<tr>
<td>Future</td>
<td></td>
</tr>
<tr>
<td>1989</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Event Name</th>
<th>Type</th>
<th>Status</th>
<th>#</th>
<th>CM</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016 Planning Law Review - RELISTED</td>
<td>Single Event</td>
<td>Not Entered</td>
<td>#9112961</td>
<td>CM</td>
</tr>
<tr>
<td>Friday, October 14, 2016, 8 a.m. CDT</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stand By Your Ladder</td>
<td>Multipart Event</td>
<td>Not Entered</td>
<td>#9112952</td>
<td>CM</td>
</tr>
<tr>
<td>Thursday, October 13, 2016, midnight CDT</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

TIP: Use the By Time and By Type filters to locate and manage your events.

TIP: Edit your event before the event begins. Your event must have an entered status to publish to the APA website and CM Search.

Certification Maintenance (CM) credit assigned to an educational program means AICP recognizes that the CM Provider has committed to meet CM criteria for length, subject matter, and instructors. Program descriptions and details are the responsibility of the programs’ providers, and APA is not responsible for the content.
Step 5: During the Event

- **Keep a registration log.** Maintain paper or electronic copies of event registration.
- **Distribute and collect event evaluations.** Remember to obtain an evaluation from each participant.
- Notify your attendees on **how to claim CM credits** and add to their online event log. AICP members are responsible for logging their CM credits and managing their own CM logs. CM staff recommends that you provide instructions for logging CM credits at your event to minimize questions at a later date.

  - Some providers have found success by distributing the **CM logging steps** (pages 22–25), either in the event program or printed on paper at a CM sign in table.

See the [last four pages of this toolkit](#) (pages 22–25) for a logging steps handout for participants.

Step 6: Following the Event

- **Maintain the registration log and evaluations for two years.** CM staff may occasionally conduct a provider review. Copies of evaluations and final programs will be requested.
- **Check your provider dashboard.** The provider dashboard allows you to see member ratings and comments about your events and activities.
MARKETING, BRANDING, PROMOTION

On behalf of all AICP members, thank you for your participation and your commitment to advancing the planning profession. We have prepared the following resources to help you get the word out about your CM-approved event.

CM Search

We continue to ensure that all AICP members are aware of the potential for earning credits by listing CM-approved events on our electronic CM Search. Here, members can search for:

- live events by start/end date, free events, state, and eventnumber
- on-demand products
- registered providers

The event listings include the total approved CM credit, description of the event, speaker name and bio, and a resource link to your organization website (if available).

Online Provider Directory

The CM provider directory is dedicated to listing all of your CM activities. Searcy by organization name to find your profile. Enhance your visibility by uploading your company logo from your dashboard to display on your profile.

CM Graphic Tool Kit

We have created a CM Graphic Toolkit to assist providers in promoting CM-approved educational activities. All providers are encouraged to market their entered events as CM-approved both prior to and during the event. We recommend use of the CM parent mark to indicate to AICP members that your program offers CM credits in your event brochure, website and other communications.

Click here to download the toolkit.

To request CM logos, please contact Alisa Moore, CM Coordinator, at amoore@planning.org.

APA e-Newsletter

APA Interact — Interact is a member e-newsletter of the American Planning Association and its professional institute, the American Institute of Certified Planners. Once per week, it offers APA news, educational opportunities, resources and listings of new CM providers, upcoming CM activities, and tips of the month, and updates on the Certification Maintenance program.

Send questions or comments about the CM Program to AICPCM@planning.org
CM QUALITY ASSURANCE

The AICP Commission is committed to providing APA's certified members with the highest quality of educational offerings through its Certification Maintenance program. Policies and guidelines for CM providers that are outlined in this CM Provider Toolkit help achieve that goal. It is essential that every provider thoroughly review these policies and guidelines. APA monitors compliance during the Provider Periodic Review.

CM Provider Periodic Review Process

APA recognizes the importance of our relationships with educational providers. Our efforts to maintain CM standards are meant to be supportive and helpful, not punitive.

All CM providers undergo the following review process prior to the conclusion of their approval period:

1. AICP notifies the CM provider of the upcoming review approximately six months prior to the conclusion of provider’s approval period, with instructions to renew the provider application and submit documentation.
2. APA staff will evaluate the provider application renewal based on:
   a. Provider renewal application: Questions on the renewal application will be similar to those on the initial provider application. Providers will be asked to use examples from activities within their most recent approval period
   b. Supporting documentation: Providers will be asked to submit an example of a participant’s completed evaluation of an event or activity that occurred during the most recent approval period
   c. Member ratings of all events: Providers must report the total average rating by attendees that logged CM credits for events and activities held within the most recent approval period
3. During the evaluation, APA staff will determine whether or not the provider’s approval should be renewed and the length of the next approval period.
4. With an approved review, APA will email provider the outcome of the review via email with a link to renew the next calendar year registration.
5. If needed, APA staff will request a meeting with the provider administrator(s) to discuss the results of the review and provide coaching.

CM Periodic Review Schedule

<table>
<thead>
<tr>
<th>How long have you been a registered CM provider?</th>
<th>Periodic reviews will normally occur</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 years or less</td>
<td>Every 2 years</td>
</tr>
<tr>
<td>3–4 years</td>
<td>Every 3 years</td>
</tr>
<tr>
<td>Five or more years</td>
<td>Every 4 years</td>
</tr>
</tbody>
</table>
Noncompliance with CM Provider Commitments

APA will take the following steps if a periodic review reveals that a provider fails to comply with the CM eligibility criteria and policies outlined in this CM Provider Toolkit.

- First time not following provider commitments: Coaching by APAs staff
- Second time not following provider commitments: Placed on a 30-day holding period during which the provider may not renew or post events.
- A CM provider that has been on a 30-day holding period and continues noncompliance with CM provider commitments will be removed as an approved provider for a period of one calendar year until successful completion of a provider application.

Occasionally, APA staff is alerted when the content or delivery of a CM event does not meet CM eligibility criteria or conflicts with CM policies. In such instances, APA staff will contact the CM provider administrator(s) by phone or email. The conversation will cover:

1. The reason for the call
2. Education: APA staff will propose a meeting with the provider to review the CM Provider Toolkit
3. Session reviews: APA staff will review the next three events entered for CM credits prior to their posting to the APA website
4. Accelerated periodic review: Will occur one year earlier than normally required. (See periodic review schedule above.)

Please direct questions about CM Provider Periodic Review to Alisa Moore at amoore@planning.org or 202-349-1007.
CM LOGGING STEPS FOR AICP MEMBERS

STEP 1

From the APA homepage, click “Log In” and using your APA ID number and website password Log In.

STEP 2

From the CM log section, click Log CM Credits

STEP 3

From the “Add Credits” section, select one of the options to log CM credits “Add Events,” “Add On-Demand,” “Add Self-Reported Credits,” or “Add Authored Credits.”
STEP 4

After selecting an option to add credits, the next page you will see is **CM Search**. You will have the following search options on this page:

- Enter a keyword (e.g. event title) or event ID number in the search field at the top,
- Use the filter to narrow your search
  - Filter by credit type (general CM credits, ethics orlaw)
  - Event type (single, live online, or multipart)
  - State
  - Date range
  - Meeting type (free, APA, and archived events).

**Additional Search Options**

- If searching for an event by Provider, use the search **CM Provider Search** located on the left menu options, type in the name of the provider and click **Go**. From the results below, select by clicking on the name of the provider. To log your CM credits, follow steps 5 and 6 below.
- If searching for a recorded webinar or streaming media product, use the “Search On-Demand Courses” option, located on the left menu options, and click **Go**. To log CM credits, follow steps 5 and 6 below.

**STEP 5**

From the results below, find your event and click the "Add to My Log" button. If this is a multipart event, you will have the option to select from a list of activity sessions.

- **2015 Community Plan Boards and Commissions Conference: Planning and Zoning for Complete Streets and Complete Communities**
  - December 04, 2015, 9:45 a.m. - 11:15 a.m.
  - Phoenix, AZ

- **29th Annual Miami Valley Planning & Zoning Workshop**
  - December 04, 2015, 8:30 a.m. - 5:30 p.m.
  - Dayton, OH
STEP 6

Please rate the event and evaluate the speaker (select by clicking the star(s)), add a comment (optional), and answer the Ethics statement by clicking to the box to confirm. Optional: Share your feedback about the event and publish.

Platting, Subdivision and Land Title Issues
CM | 1.50
C | 1.00
You are logging into your 2014-2015 CM reporting period.

☐ I was a speaker/instructor

Rate this event:

Comments (optional)

☐ You may publish these comments, along with my name, on APA’s website to help other AICP members judge the quality of this provider’s events.

☐ Through my ethical obligations, as governed by the AICP Code of Ethics and Professional Conduct, I verify that I attended this program in full.

Submit

If a speaker is listed, you must evaluate (select by clicking the star(s)), add a comment (optional: add comment and publish along with your name on the APA website), and click the green submit button.
STEP 7

Click "submit" and the CM credits will appear in your CM log. You will receive a green bar confirmation at the top of the screen confirming your claim was successful.

SPEAKER / INSTRUCTION CREDIT

If you wish to claim an additional 1 CM credit for speaking at an event, click the box to confirm "I was a speaker/instructor."

See the screenshot below. Using the “Credits requested” dropdown menu, select the number that represents the total credits offered by the event PLUS 1 CM credit. For example: If the event at which you spoke offers a total of 1.5 CM credits, you add 1 CM credit for speaking and choose 2.5 CM credits from the dropdown menu.

AICP Members: If you have any further questions or experience an issue reporting your CM credits, please contact a CM customer service associate at: AICPCM@planning.org.