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 brings together thousands of people—practicing planners, engaged citizens, elected officials, students, and more—who are 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—provides leadership in professional development, ethics, and the standards of planning practice.

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Chicago, IL 60601
(p) 312-431-9100
(f) 312-786-6700

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

aicpcm@planning.org
www.planning.org

AICP-Certified Planners

AICP-certified planners are members of the American Institute of Certified Planners.

More than 17,000 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/.

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

What Is Certification Maintenance?
All professional planners who are members of the American Institute of Certified Planners must engage in continuing education to maintain their certification. AICP members must earn a minimum of 32 Certification Maintenance credits every two years—including at least 1.5 CM credits each on the topics of ethics and current planning law.

AICP’s CM program strengthens planning practice and the integrity of the AICP credential by establishing professional development standards applicable to all AICP members.

The CM program helps certified planners earn mandatory credits and keep up with trends, new technologies, and best practices by linking them to education and training opportunities.

Goals of Certification Maintenance
Since its establishment by the AICP Commission in 2008, the CM program has recognized the diversity of the planning profession. The program offers flexibility in earning CM credits and a broad range of educational opportunities that address the professional development needs of all AICP members, including those who work in both the public and private sectors, in the planning academy, and in non-traditional planning roles.

In April 2018, the AICP Commission established these goals for the Certification Maintenance program:

- Require ongoing professional development for all AICP members
- Align professional development opportunities with AICP’s Core Competencies
- Elevate innovative planning practices, emerging issues, planning trends, planning specialties and best practices
- Ensure the availability of appropriate professional development opportunities at all career levels
- Establish standardized CM requirements that all members must achieve to retain their AICP credential
- Promote ethical practices as stated in AICP’s Code of Ethics and Professional Conduct, including mentoring and volunteering
- Promote a broad range of accessible and affordable CM credit options
- Ensure user-friendly, easily accessible CM management and logging systems
- Provide flexibility for CM providers, including public and private sector providers and APA chapters and divisions
- Promote AICP values, including diversity and inclusion, through the CM program
- Annually evaluate program performance based on CM goals and corresponding metrics

What Is a CM Provider?
Organizations approved by AICP to provide continuing education activities and events for CM credit are Certification Maintenance Providers. All education providers, including APA and its chapters and divisions, must apply to become CM providers.

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 or nongovernmental organizations
- Professional training services
- Government and other public-sector entities
- Private firms and companies
- Universities and other academic institutions

**What Are the Benefits of Becoming a CM Provider?**

Some benefits of being a CM provider include:
- Advertise your education and training on the APA’s website viewed by more than 17,000 AICP members
- Inclusion in the online search of approved CM providers
- Use of the CM logo in marketing and promotional materials
- Password access to online services, templates, my organization 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 educational events
- Ability to enter your non-CM eligible events—such as training for planning commissioners or the public—for promotion on the APA website if certain criteria are met (see page 14)

**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 based on 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 who 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 any written, oral, or 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 or 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 event details that have been changed from what was entered into and approved in the CM system.
10. Providers shall not charge AICP members any additional registration or other separate fee for earning CM credits.

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 that 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 approved 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 four steps to becoming an approved CM provider:

1. Create a My Organization account
2. Submit a completed online application
3. Be approved by AICP
4. Select and purchase a payment plan

Step 1: Create a New Account for Your Organization

You must create a new organization account in order to access the online provider application, tools to manage your CM registration, administrators linked to your account, and events entered for CM credit. Create an organization account.

Step 2: Submit a Completed 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 3: Be Approved by AICP

Provider applications are accepted for review at any time. AICP will notify the provider administrator via email of the application’s 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 has never been an approved CM provider, the “Period as an Approved CM Provider” is “New.” For a current or former approved CM provider, the “Period as an Approved CM Provider” began the year the organization was first approved.

<table>
<thead>
<tr>
<th>Period as an Approved 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>5 or more years</td>
<td>4 years</td>
</tr>
</tbody>
</table>
Approval periods expire on December 31 of the last year of the approval period (refer to the chart above). Provider fees are due annually, every January 1. Each October, APA will remind providers to purchase a payment plan for the next calendar year.

**Step 4: Select and Purchase a 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 My Organization 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. Please contact AICPCM@planning.org if you have any questions about choosing the right payment plan.

Note:
- All provider plans are nonrefundable.
- An annual per-credit provider plan may be upgraded to an annual unlimited plan at any time.

**Payment Plan Types**

There are two payment plan types: Annual Per-Credit and Annual Unlimited. The Annual Per Credit plan is based on paying as you enter each event. This plan is best if you offer only a few events per year. The Annual Unlimited plan may be the best and most cost-effective option if you plan to offer multiple events per year or have a larger conference with multiple planning activities that offer CM credit.

Providers that have departments or sub-groups within their organizational structure may choose to purchase an Annual Unlimited plan and a separate provider number for an additional $95 per department or sub-group. Sub-groups then share registration powers under one Annual Unlimited payment plan. 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 an organization becomes an approved provider. Get complete details about payment plan options and pricing.

Credit cards and checks 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
MY ORGANIZATION DASHBOARD

Access and manage your CM account and events from your My Organization Dashboard. It includes the following types of information:

- Administrators, company logo, description, and last four digits of tax ID number
- Approved application(s), and link to the CM Provider Toolkit
- Payment plan
- Order history and receipts
- Event history, event and speaker ratings and comments, and event ID numbers

Manage Your Account

These dashboard functions will help you manage your account:

- **Add or remove administrators** and monitor who is linked to your organization’s dashboard
- **Add and edit your company logo and description.** Use this great opportunity to promote your organization on APA’s website!
- **Edit and resubmit a deferred application.** Once approved, your application will be viewable as a starting point for future submissions.
- **Renew your annual registration and payment plan.**
- **View your partners organizations.**

CM EVENT ENTRY

Once you are an approved provider and have purchased a payment plan, you may begin entering and publishing events on the APA website. As an approved provider you are committed to ensuring that all events entered into the CM system conform to CM policies (see page 14).

Providers must enter activities offering CM credit in order for participating AICP members to log the CM credits.

How CM Credits Are Measured

CM credits are measured in a quarter hour increment. One CM credit is granted for each contact hour of instruction, so:

- One contact hour of instructional time = 1.0 CM credit
- 30 minutes of instructional time = 0.5 CM credit

An event must be at least 15 minutes long to be eligible for CM credit.

Noninstructional activities or breaks (i.e. bathroom breaks, etc.) cannot be included in contact hour(s) and should not apply toward 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 during the travel.
- Time for participants to move between sessions should be considered 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 CM criteria (see page 14).
• Facilitated book discussions are eligible and must meet the CM criteria. Credit should not be given for reading the book, only the amount of time spent in the facilitated discussion.
• Credentialing exam preparation activities are not eligible for CM credit (e.g. architectural registration, LEED ND, and AICP).
• Some career-related courses are eligible if they meet CM criteria. Examples of eligible courses include conflict resolution with a focus on planning and management with a focus on planning. Courses that focus, for example, on advanced Excel training, general project management, career advice, or resume enhancement are not eligible for CM credit.

Standards of Delivery and Administration

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

- Are led by one or more subject matter experts. An expert is defined by AICP as a professional who has contributed to the profession through practice, teaching, research, or publications or through 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.
- Do not include proprietary information. Materials used during the CM credit portion of the event must be solely for educational purposes.
- Are at least 15 minutes in duration.
- Take the amount of time that matches the CM credit offered. For example, an event lasting 75 minutes offers 1.25 CM credits; an event lasting 90 minutes = 1.5 CM credits.
- Include an announcement notifying AICP members that they must attend the entire event in order to receive CM credit.
- Are unbiased and nonpromotional. 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 participants.

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 online event that occurs one time on a specific date. Single events include workshops, lectures, symposiums, webinars, and webcasts. The participants and instructor participate 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.

**Multipart Event**
A multipart event is a live event with multiple activities, such as a conference with several sessions or multiple registration options. Participants at a multipart event choose among a variety of activities or portions of the event. Individual participants may earn different numbers of credits.

Note: If you choose this event type, you will be asked to enter information for each of the activities available at the event that you want to offer CM credit. The event will appear once on APA’s online CM Search; the individual activities will appear within the event’s detail in the search results.
On-Demand Education

Recorded educational products entered for CM credit allow participants to obtain high-quality training anytime, anywhere. The provider must include a link to the educational materials (i.e. PowerPoint presentation, PDF, survey, etc.). APA will not post CM providers’ materials or recordings on the APA website.

There are unique CM eligibility criteria for on-demand education. 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 the 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
   - Question-and-answer forums
   - Online discussion boards
   - Additional methods 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 be acknowledged in the materials. The CM provider will keep copies of all copyright and reproduction permissions and provide them upon request to APA staff during a CM review. The provider also will obtain copyright agreements from the course instructor(s) and make them available to APA staff.

Event Statuses

Status indicators on the My Organization Dashboard are meant to assist you in managing your CM events. Your event will be tagged with one of the following labels, depending on its status. Please see instructions for entering an event (see page 18).

Cancelled

This event has been cancelled and removed from the CM Search.
Not Entered
This event has not yet been entered for CM review. If you wish to remove it from your dashboard, email AICPCM@planning.org and provide the associated event ID number and title, with 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. You may edit entered events from your My Organization Dashboard.

Changing or Relisting Your Event

Relist
If an event you entered for CM credit will occur more than once you may use the relist tool to save time on re-listing. Most events—except multipart events—are eligible to be relisted. To use this tool, select “relist” next to event you wish to repeat. The system will make a copy for you to edit and enter as a new event, leaving the original event unchanged.

Edit and Cancel
CM providers may make changes to entered events that have not yet occurred. If you are changing or canceling an entered event after the event date, you must request the change by contacting APA staff at AICPCM@planning.org.

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 substantive 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 canceled.
- **Select an evaluation mechanism.** CM providers are required to use an evaluation mechanism to assess each event’s or activity’s quality and relevance to its purpose or objectives. Get a sample here.
- **Select a mechanism for recording attendance.** Each CM event must include a mechanism of recording AICP members’ attendance, such as a registration list of attendees or a sign-in sheet. APA will review provider records at the end of your approval period. Get a sample sign-in sheet here.

If your event (e.g. conference) has several activities, one registration list will suffice; a sign-in sheet at each session is not required but the provider 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.** Providers who are audited will need to produce participant sign-in information.
- **Register your event early, then promote your event.** See instructions on entering a CM event (see page 18) and branding and publicizing a CM event (page 23). Branding cannot be used in promotions unless the event has been entered.
Content Considerations

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

1. How will the event offer a professionally relevant learning experience for a planner (e.g. for a planner with at least four years of experience after earning a two-year master's degree)?
2. How does this event meet a specific-planning-related training objective?
3. What are the specific training objectives and how does your event meet them?

**Non-CM Event Promotion**
Special benefit for approved providers! You may enter your non-CM eligible events for promotion on the APA website if the following criteria are met:

- You have an active provider registration for the calendar year in which the event is held; and
- Education is intended for one of the following target audiences:
  - Emerging Professionals: Planning education that does meet the educational level of a certified planner
  - Non-Planner Public: More basic than at a professional level for a certified planner
  - Planning Commission or Official: 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 may — but are not required to — choose from APA’s speaker database.

**Choose from APA’s Speaker Database**
To choose from APA’s speaker database, enter the speaker’s name 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 to manually enter the speaker’s name and bio.

**Star Rating**
Speakers in APA’s speaker database receive a star rating (as do events when AICP members log CM credits.

### 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 go to the next step in event entry

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 introduce relevant issues, 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 in a specific 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 an ethics session, consider offerings of at least 90 minutes. AICP attendees will appreciate this consideration since participating in only one session will fulfill their ethics requirement.

To receive CM ethics credit, an ethics session that includes breakout groups must include a facilitator for each group who is experienced with the Code and prepared to guide the group and speak authoritatively on the topic of ethics. Facilitated breakout groups should remain relatively small.

Note: A session that includes breakout groups must subtract 15 minutes from the length of the session in calculating the CM credit. For example, a session that includes breakout groups must last 105 minutes to deliver 1.5 CM credits.

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 use a long format) but should focus on some aspect(s) of the Code in depth.

To what extent does a session have to deal specifically with planning issues in order 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 refer to the document *Ethics in Planning: A Toolkit for Conducting Ethics Sessions* to craft training that best meets the size, goals, and learning styles of their audiences.

**Law**

Providers must demonstrate that the content of the activity is related to planning law (e.g. environmental law, land use law, redevelopment law, administrative law, housing law, etc.) Activities submitted for CM law credit must be closely related to *recently enacted planning laws* or *recent* (within the last 10 years) case decisions or trends in existing planning laws or case decisions. Training on law must constitute most of the content of the activity.

**Short, Timed Presentation Sessions**

These presentations are short—often six or seven minutes—and accompanied by a timed set of 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 14)
2. Topical themes must be organized in 15-, 30-, 60-, 90-, or 120-minute modules (e.g. “Retrofitting Suburbia” or “Public Engagement”).

**Unconference Event or Activity**

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

**Recommendations, But Not Requirements**

- Social media: Website and pre-event solicitation of ideas; Twitter, blogging, and a forum can all enhance the experience participating in this type of activity.
- Ignite Talks (also called Lightning Sessions) can 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 if they:

- Meet the CM eligibility criteria
- Maintain the CM standards of delivery
- Are focused on one topic
- Have an event theme and boundaries or a departure point such as “transforming transportation”
- Engage an expert facilitator (see above for AICP’s definition of an expert speaker)
- Enable active participation from attendees
- Constitute a full or half day. The event should last no fewer than three hours and can be as long as eight hours.
• Are peer-developed and driven
• Have topics selected by attendees
• 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

Welcome and Orientation (no CM)
9:30-9:45 a.m.

Ignite Talks (CM)
9:45-10:15 a.m.

Panel Picking (no CM)
10:15-10:45 a.m.

Coffee Break (no CM)
10:45-11:00 a.m.

Table Time A (CM)
11:00-11:45 a.m.

Table Time B (CM)
11:45 a.m.-12:30 p.m.

Lunch (no CM)
12:30-1:30 p.m.

Table Time C (CM)
1:30-2:15 p.m.

Table Time D (CM)
2:15-3:00 p.m.

Coffee Talk (no CM)
3:00-4:00 p.m.

Wrap-up (CM)
4:00-4:30 p.m.
Visual Guide for Entering an Event and Understanding My Organization Dashboard

Use the Visual Guide to learn more about the features of event entry and your organization dashboard.

1. EVENT TYPE After selecting an event type, the following is the basic event information needed to enter an event for CM credit (top of event entry webpage)

2. DESCRIPTION OF EVENT (middle of event-entry webpage). Add answers to the CM Eligibility Criteria questions within your description. Note, 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. The event or activity description and details are the responsibility of the educational provider, and APA is not responsible for the content.

Next: Description of Event and Speakers
3. SPEAKERS (bottom of event entry webpage)

TIP: Use the formatting menus and tools to make the text easily readable and use the “eye” button (circled) to preview your description before it is posted and visible to all in the CM Search.

Choose from these two options to add a speaker:

1. search for a name in APA’s contact list
2. manually add speaker information.

Next: My Organization Dashboard

The dashboard is your organization’s customized homepage. From the dashboard, you can manage your provider application, registration, administrators, and events for CM credit.
- Your Organization Logo and Description

- Transaction History: View the most recent or all transactions, manage organization address and email, see application information, and link to helpful resources.

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**Administrators**

To remove an administrator, click on ‘Remove x’.

To add an administrator, enter the new administrator’s email address in the search box below and select the appropriate search result.

Note: every APA member has an APA account. If your search for a member’s email address is unsuccessful, please ascertain and use the address that is associated with the member’s APA account.

If there is no record with that email address, create a free nonmember account. When you’re finished, you will be directed back to the current page (or Organization). Search again using the email address for the account you just created.

<table>
<thead>
<tr>
<th>NAME</th>
<th>COMPANY</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexandra Peet</td>
<td>AlisaMoore</td>
<td>None, None</td>
</tr>
</tbody>
</table>

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**Transaction History**

- **Recent Transactions**
  - 2017-04-03
    - Order #124933
    - CM Per-Credit Payment
  - 2017-03-03
    - Order #121731
    - CM Per-Credit Payment
  - 2017-01-26
    - Order #116597
    - CM Per-Credit Payment

**CM Provider Overview**

- **Provider ID:** 239883
- **Address**
- **Phone, Email, & Website**
- **EIN Number:** ******7141
- **Rating:** 4.1 out of 5 (197 reviewed)
- **Application Status:** Approved (through Dec. 31, 2019)

**CM Provider Resources**

- CM Provider Toolkit
- CM Graphic Toolkit
- AICP Ethics Toolkit
- Contact APA
- Purchase an annual registration, enter and manage events for CM credit, and view partners (if any) that share a registration with your organization.

**CM Registrations**

- If eligible, you may purchase or renew Annual Unlimited Registration here.
- Payment plans purchased before September 30 are active through December 31 of that year. Plans purchased on or after October 1 may be for the remainder of the current year or for the next full calendar year.

**CM Provider Events**

- **Upcoming Events**
  - PIE Webinar: Go Green With GASB 62!
  - RELISTED
  - #9176076
  - Sunday, June 30, 2019, midnight CDT
  - CM | 2
  - APA 2019 Policy and Advocacy Conference
  - #9176090
  - Monday, September 23, 2019, 8 a.m. CDT
  - CM | MULTI

- **View All Events**
  - Click on “View All Events” to see and edit or delete any past or future event.

**Partner Providers**

- You are linked to the following partner organizations based on your EIN number.
  - APA International Division
  - APA Regional & Intergovernmental Planning Division
  - Small Town and Rural Planning Division
  - APA

- View all
- To have a company linked to yours, please contact Customer Service.

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**During the CM 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 logs. AICP staff recommend 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**, either in the event program or printed on paper at a CM sign-in table.

**Following the CM Event**

- *Maintain the registration log and evaluations until your periodic review.* CM staff may conduct a provider review and request copies of evaluations and final programs.
- **Check your My Organization Dashboard** to see member ratings and comments about your events and activities.
- Providers may help AICP members claim CM credits by providing the link to the **visual CM logging guide**.
MARKETING, BRANDING, PROMOTION

Thank you for participating in the CM program and advancing the planning profession. The following resources will 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 the CM Search webpage. Here, members can search for:

- **Live events** by start/end date, state, and event number
- Free events
- **On-demand courses**
- CM providers

Each event listing includes the total approved CM credit, description of the event, speaker name and bio, and a link to your organization website (if available).

CM Provider Search

The CM provider search lists all of your CM activities. Search by organization name to find your profile. Enhance your visibility by uploading your company logo from your My Organization Dashboard.

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 in your event brochure, website and other communications to indicate to AICP members that your program offers CM credits.

Download the toolkit.

Contact Alisa Moore, CM Coordinator, at amoore@planning.org to obtain graphic files of CM logos.

APA E-newsletter

*Interact* is the weekly e-newsletter for members of the American Planning Association and its professional institute, the American Institute of Certified Planners. It offers APA news, educational opportunities, resources, and a link to CM activities.

**CM Provider Insider**

This is quarterly e-newsletter for CM providers delivers important news and information about AICP’s Certification Maintenance program. It describes policy and program changes, best practices, technical program revisions, and webpage updates. Past issues are archived on the CM Providers webpage.
CM QUALITY ASSURANCE

The AICP Commission is committed to providing APA’s certified members with the highest-quality educational offerings through its CM 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’s renewal based on:
   a. Renewal application: Questions on the renewal application will be similar to those on the initial application. Providers will be asked to use examples from activities during their most recent approval period
   b. Supporting documentation: Providers will be asked to submit three participant evaluations 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 who logged CM credits for events and activities held within the most recent approval period
3. During the evaluation, APA staff will determine whether the provider’s approval should be renewed and the length of the next approval period.
4. If the application is approved, APA will notify the provider via email with a link to renew registration for the next calendar year.
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 fewer</td>
<td>Every 2 years</td>
</tr>
<tr>
<td>3–4 years</td>
<td>Every 3 years</td>
</tr>
<tr>
<td>5 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: Coaching by APA staff
- Second time: 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 completion of a successful 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: Review will occur one year earlier than normally required. (See review schedule above on page 23.)

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