



Certification Maintenance – APA Chapter Best Practices

APA Wisconsin

1. **CM Officer** - Created a board position to specifically deal with CM: "Certificate Maintenance Officer".
2. **CM Session Registration Form** - Registering events – all information must come in on the "official form" that lists the questions required by AICP. Chapter will not submit for credits without a completed form.
3. **Listserv** - Maintain a listserv for all AICP members in the state through which announcements (more like reminders) of CM opportunities are sent.
4. **Session Quality Policy** - We have a policy that all sessions at our annual conference and spring workshop (if we have one) will be CM worthy.
5. **Minimum Credit Offering Policy** - Chapter has a policy that it will provide either directly or through partnership, at a minimum, 16 CM credits per year and offer ethics and law at least once every two years.
6. **CM Partnerships** - Currently working with University of Wisconsin Extension and other organizations to create standing partnerships for educational series that are offered on a regular basis - especially if they are offered on-line. We have identified several series of particular interest to planners and have been able to be listed as a co-sponsor. This allows us to have input to content and a logo on the marketing. In return, WAPA takes care of applying and paying for CM
7. **CD / Video Library** -We also plan to film/acquire appropriate videos and hope to develop an arrangement with our state library system to allow these tapes to become part of the lending library. We are waiting for AICP to complete the policy on this and will then move forward assuming the fees are not prohibitive.

APA Rhode Island

1. **APA/AICP CD Event Series** - Chapter purchased ten APA/AICP CD-ROMs. We show one per month at various sites around the state and, until this past September (pending resolution of APA licensing issues), made these available to borrow through a

lending library. We have had mixed results with low turnout at the "showings", held 4:00 to 6:00, followed with discussion and snacks.

2. **CM Partnerships** - Several local providers have emerged to support CM in Rhode Island. Grow Smart RI, Northeastern Economic Developers Association, and Blackstone Valley Tourism have become registered providers. RIAPA works closely with Grow Smart RI for much of the land use training in the state. As a non-profit, the changing fee schedules and lack of flexibility for fees for the same program scheduled at different locations in the state has been very frustrating to them since their training rates are low. Other providers have said that if they attract one or two additional attendees for their events, they feel that CM is a good draw (these events have much higher registration fees).

APA Northern New England

1. **CM Session Registration Form** - It is imperative to pull together a packet of information for conference/workshop organizers to complete. We used APA's speaker information sheet and required speaker bios and a description for every session from the conference organizers. This saved the PDO time and made those responsible for the session more accountable for the CM requirements.

2. **Teleconferencing and CD's** - Sharing the Audio Visual CDs seems to help to some extent, but in a rural area, teleconferencing is key - people will not and can't afford to travel long distances for 1.5 credits.

APA Tennessee

1. **Minimum Credit Offering** - Our chapter has made a commitment to have a minimum of 16 CM credit hours available at each fall conference.

2. **Law and Ethics** - We will offer ethics and legal/legislative issue sessions at each conference.

3. **AICP Ethics Resources** - For ethics training, Graham Billingsley gave us an excellent PowerPoint presentation and we added some Tennessee ethics requirements, it went well and we had some great discussion.

4. **Section Funding** - Added money in the budget to help each Chapter Section to provide CM training.

APA Massachusetts

1. **CD / Video Library** - We thought we would create a chapter lending library for cds so that planners could get their CM credits on their own and to address issues such

as proximity to events (our larger urban areas tend to have more than our rural areas). We thought we would use the state library program to host the cds. It turns out that not all libraries use interlibrary loan and they are not necessarily willing to lend cds to other library systems. We are still tweaking this one, but it has taken us months to get product into the system.

APA North Carolina

1. **CM Partnership** - Started a partnership with Lorman Education to offer 15% discounts to NCAPA members. They do both live session and Web based classes. We will end up getting a small cut for members that sign up for classes through our web site.
2. **CD / Video Library** - Developed a CD Loan Library to help our Sections hold CM events. We started with a library of 10 CD's and will add to it if it is found to be popular.
3. **CM Partnership** - Our Networking Committee has and continues to contact other organizations such as NCAIA, NCASLA, NCAZO, NCMPO, NCGIS, and our Universities to form partnerships on continuing education. NC State and NCMPO have offered CM courses (NC State has offered 13 courses so far). The bi-annual NCGIS conference (spring 2009) will offer CM credits and has one of our executive committee members on their planning committee.
4. **Technical Assistance** - Provide Technical Assistance about the CM website for providers in NC. We had received complaints from some that it was too complicated or a hassle. The result was that they found out it wasn't too hard once we helped them the first time. We've had to be proactive because national can take a long time to get back to the providers when they have questions. This situation seems to be improving. Since August 2007 we have had over 57 CM events offering over 320 CM credits.
5. **APA Chapter Conference Marketing** - SC, VA, and NC are co-marketing our state conferences. SC and VA just advertised the NC Fall 2008 conference and we are advertising the SC Fall 2008 conference. We have offered to market the VA Spring 2009 conference.
6. **Member Survey** - Surveyed our Chapter Membership to determine, among other things, how best to communicate with them and what course offerings would most interest members. Based on our results the best mode of communication is direct e-mail. We have a tool we call E-Blast that we use to send direct e-mail to members. We are going to begin monthly e-mails with a rolling 3 month event calendar. We know that the e-mails work as we were hovering at 200 attendees for our 2008 Annual Conference 3 weeks prior to the event, we sent the first E-Blast and the

next morning we were up by 50 registrants and two days later we had 100 additional registrants. We sent two additional blasts. The conference registration finished at more than 600, our largest ever.

7. **Live Webinar Sharing** - Some of our larger local governments are ordering the interactive CM programs put on by national for their staff and opening up seats to others when they have room. We have publicized the opportunities on our website.

8. **CM Event Calendar** - Maintain calendar of upcoming programs that are available for CM on our website. We find that even though national has improved the search function for programs, members still don't routinely check there. They are more likely to go to our site first. We will also advertise a program before it goes on the CM event calendar (i.e. CM requested)

9. **DVD Production** - We have an ethics and planning law workshop scheduled in December that we hope to videotape and get approved as a DVD. By trying to produce our own DVD we hope to reach some of our rural areas.

10. **Section Funding** - Our annual budget provides \$250 per section (7) to help fund events. The original amount was to cover 5 CM credits. We have left the funding in place for snacks or help subsidize lunch costs.

11. **CM Minimum Credit Policy** - Adopted a minimum CM credit policy for Sections (ours are geographic rather than topical). Our policy requires that each section provide at least 5 CM credits each year.

APA Utah

1. **Greater Provider Participation** - From what I hear, it's a very positive step that we were able to adjust fee schedules to accommodate non-profits, thank you. I receive more positive responses also as more providers register and more opportunities become available for members including webinars, to earn CM credit.

APA-New Jersey

1. **PDO** – Need a dedicated PDO, but make use of opportunity to have two other people to enter CM into provider system. Do not burn your PDO out!
2. **Volunteers** – Need dedicated volunteers (with follow through) to get events pulled together. We make use of our ExComm for our CM offerings—CM is part of their duties as and officer.
3. **Location** – hold events in various locations throughout Chapter region to enable

broader participation.

4. **Partnerships** – Chapter success catches on—went from 300 registrants to 450 the year CM began. Others saw this success and became providers. APA-NJ provides technical assistance to new providers and advertises their event on our webpage, in our weekly e-mails and in our newsletter.
5. **Lesson** – Require all CM information at request for sessions—makes it easier to enter data, without having to chase down bios, etc after the fact.
6. **Set Chapter Goal** – Decide how many credits the Chapter will provide and at what cost. NJ goal (not yet met, but working on it):
 - 5 Regions with \$500 budget to each provide one free/low cost workshops/walking tours a year. (10-15 credits)
 - 4 Committees with \$250 budget to each provide one free/low cost workshops/walking tours a year. (8-12 credits)
 - Offer APA webcasts at two locations in the state. Charge \$5 to help defray costs (Approx 10 credits)
 - 2 day Annual Conference with \$255 full registration rate. (10.75 credits). The Conference will annually provide 1.5 credits of Ethics and Law. It also includes walking tours.

APA Oklahoma

1. **Webcasts** – Register and hold a one hour round table discussion after the webcasts to gain more credit.

CM Issues

1. **University Registration Issues** - While it would be ideal if UW Extension became a recognized provider, the chances of that happening are slim to none. (APA WI)
2. **Speaker Credits** - On the CM FAQ, it states that speakers can receive 1 credit hour of prep time for the presentations but there is no link for them to actually receive that 1 hour of credit. If there is a clear way for speaker to receive this credit, PDOs could send each speaker a link to how they can receive additional credit for preparation of materials. (APA NH)
3. **Pricing** - We still feel like the pricing structure and the overall CM program are more geared towards larger chapters, cities, and universities. There have been great

changes to the price structure which may help our chapter but there is been no great relieve for our governments and school systems. I feel gaining CM in rural areas will always be more challenging then for those in urban areas, unless you have a lot of money to travel (and who has that nowadays). (APA NH)

4. **Lack of Reports** - We tried to get a report from AICP national on the number of events held and credits offered in NC but it was not very complete or user friendly. We have also been trying to figure out how NCAPA AICP members are doing with their continuing education and have had no success from National. We would like to find out which ACIP members has not done much and contact them. (APA NC)

5. **Events for Specialties** - Biggest complaint from members is the lack of programs for some specialties. We tried to help the situation by offering transportation programs at our conference. We are looking forward to the self-reported credit option to see if that helps. (APA NC)

6. **Lack of Credits at Allied Conferences** - Popular conferences that planners typically attend do not currently offer CM credit for most of their sessions, (Railvolution, national sustainability conferences, local ULI conference, local ITE conference, Utah League of Cities and Towns conference, university courses and seminars, ITE or PWA Webinars, yearly UDOT conference, etc.) (APA UT)

7. **Lack of Credits at Allied Conferences** - Several area organizations where planners are not the major discipline of their membership base, but where the content is tremendously valuable do not currently register their event. Expense still seems to be a main concern and the reason many popular conferences don't register. (APA UT)

8. **CM Registration too Difficult** - There are also concerns from small organizations that see the CM process as involving too much work and expense for the 3-5 planners that will be attending their conference. (APA UT)

9. **CM Registration too Difficult** - I hear complaints that the submittal process and deadlines make CM applications difficult, and cumbersome. (APA UT)

10. **CM Registration too Difficult** - Some of our local APA conference sessions are not registered for CM that I would think would be eligible. These are usually mobile workshops. From what I understand, this is mostly because the speaker doesn't bother to register the session. We should be able to register local mobile workshops on the spot. Knowing the community, the development in question and maybe visiting with the speaker in charge for a moment or two, we should have enough background to approve these workshops shortly after they are submitted. In my opinion, a field visit to a new project rarely occurs without creating a learning opportunity. (APA UT)

11. **Narrowed Training Emphasis** - A different type of concern now is that with

CM on the radar for certified planners, many do not attend sessions or lunches or workshops that do not offer CM, saving their time and financial resources for the CM opportunities. (APA UT)

12. **CM Approval too Slow** - It is difficult for our chapter when we have deadlines to publish conference materials and have difficulty identifying the CM approved sessions. (APA UT)

13. **Webinar Distribution** - It would be nice if APA Web Casts that are paid for by Chapters can be distributed or to our members unable to attend the original broadcast, without additional cost and will the opportunity to earn full CM credit. (APA UT)

14. **CM Fee Change Confusion / Fairness** - Misunderstanding and confusion regarding CM fees for the joint OH-KY-IN Regional Conference. Verbal assurances made at APA National conference that Chapters should continue registering events using old rates and reimbursements would be made for the difference between fees paid and the newly adopted fee schedule. For the conference they paid for events, then told they would not get reimbursed as originally understood so they canceled the registration and are waiting for the new fee structure. In the meantime, the event is not listed on the CM web site and feel as if attendance is being negatively impacted. (APA OH, APA, KY, and APA IN)

15. **CM Fee to Review Courses** – Allied organizations hesitant to spend the money to have their courses reviewed, for fear they will not be approved. They decide not to offer CM at all. (APA-NJ)



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