MMSA CPD Program FAQs

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Who is required to report CPD hours to MMSA?

Those MMSA Members who have received QP status must participate in a CPD program. The MMSA CPD form, while recommended, is not mandatory for use by our QPs. If a QP prefers to use a form from another professional entity such as the AIPG, AusIMM, etc., that is acceptable as long as it addresses ethics, continuing education, and professional practice and development. Other Regular MMSA Members may voluntarily participate. Return to Contents.

What are CPD Hours?

CPD hours should focus on learning and activities in areas relevant to a professional's technical and management disciplines that are *over and above* normal work-related activities. This covers a very broad range of activities and the CPD main activity areas and the **CPD look up table.xlsx** file on the MMSA website can help identify and categorize CPD activities. Whether a particular activity should qualify as CPD is left up to the individual QP's judgement although when your CPD log is assessed for compliance, questions can be asked and a particular activity might be disallowed.

CPD hours are contact hours recorded in one of several CPD main activity areas. The CPD main activity areas and their 2-letter codes are:

PP: Professional Practice hours record the time spent on normal work-related activities. They cover time billed to a particular project or activity recorded on time sheet completed for either an employer or client. However, and particularly for consultants, there are a wide variety of non-billable hours that count as professional practice. For the salaried professional, "overtime" hours can count as professional practice hours. These can include hours spent for a client or on a project but that are not billed for one of a variety of reasons like business development hours. Unpaid hours spent on a particular individual professional specialty can count. For example, unpaid time spent on drafting papers or presentations on professional ethics or time spent drafting documents for a professional organization, for example, proposed changes to the *SME Guide for Reporting Exploration Information, Mineral Resources, and Mineral Reserves* or revisions to standard definitions such as those issued by the CIM, or best practice guidelines or the time spent drafting the details of MMSA's CPD

program. Also included is the time spent on the preparation of publications devoted one's QP specialty on nights and weekends.

Professional Practice are designated using the "PP" code on the CPD log. They are not combined with other CPD hours. Professional practice hours can be summarized by job or by month in a manner that does not disclose confidential information but does disclose the type of work being done. For example: "reserve audit in a 43-101-format report for client 1" or "worked on upgrading comminution system," or "prepared environmental compliance reports for state DEQ" or "drafting paper on an improved technique for preventing slime formation during comminution." "Drafting paper on an improved technique for preventing slime formation during comminution" is an example of an activity that can be logged twice, once as PP and once at CK, Contributing to Knowledge. Because PP coded hours are not combined with CPD hours, this double logging does not double the number of total CPD hours.

FE: Formal education (tested and untested) attended. Report the hours spent in classes and labs as well as hours spent in study and research.
SC: External and internal short courses and webinars attended. The courses can be technical or courses with a mining or related theme run by commercial organizations, and do not have to be taken for credit. Report the hours spent in the short courses and webinars.
CM: Technical conferences and professional society meetings and field trips report the hours spent in conferences, meetings, and field trips.
CK: Contributing to knowledge can include hours spent leading field trips, creating new courses, presentations of papers at conferences, and material researched and written for publications.
SE: On-the-job Skill enhancement or Maintenance can include courses to meet or maintain required regulatory safety, certification, operations, and other programs. For example, the courses could include company, MSHA, or EPA training; first aid courses, computer software training, etc.
PR: Private reading of professional publications. Report the hours spent reading professional journals, books, and similar publications. You may also report reading to support ancillary professional skills like computing skills.
IE: Industry engagement can include hours spent on service to industry, society committee meetings, mentoring, public outreach activities, and similar efforts.

Experience has shown that a particular activity could be counted in two or more of the above CPD activities. Pick a category; the summary of the CPD activity should let reviewers/auditors know what you were doing. As the revised Geological Society of London CPD program notes, "Because an attempt is being made to classify and group a wide range of diverse things [CPD activities], it is necessarily an artificial and imperfect grouping; there are other equally valid ways of 'slicing the cake'." A fuller discussion of this topic is contained in the **MMSA CPD program introduction April 24.docx** file on the MMSA website. Because the selection of a Main CPD Activity for a particular activity can significantly affect the credit received for that particular activity, MMSA has decided not to cap the amount of CPD credit given for any of the CPD Main Activity areas.

Professional ethics CPD activities can be part of any of the main CPD activity areas. See the "How do I acquire Professional Ethics hours?" and "How do I report Professional Ethics hours?" FAQ topics. Return to Contents.

Professional Practice hours—why are they logged and credit given

Some CPD programs call for reports of professional practice hours for two reasons. First, how much time has one practiced during the reporting year or period? Should some minimum number of professional practice hours be logged in order to maintain one's QP status? And second, is the recognition that in conducting one's professional work, one learns new concepts, approaches, the use of new or improved tools including software and therefore some CPD credit should be given for professional practice. These are both good reasons but face two equally valid practical problems, what constitutes professional practice and how much CPD credit should be given. These two problems are discussed in detail in the ***Professional Practice issues.docx*** on the MMSA website. At the present time, MMSA has not decided how to answer the questions, what constitutes professional practice and how much CPD credit should be given. It is hoped that experience with the CPD program will help provide answers. For those who don't work full-time, the issue of what non-billed time counts as professional practice is a non-trivial issue if some minimum number of professional practice hours are required. The question of how much CPD credit should be given for Professional Practice involves some capping of Professional Practice hours. Those who don't work full-time are likely to receive a proportionally greater percentage Professional Practice hours credit than those who work full time. This doesn't seem fair. We hope that experience with the CPD program will provide data that can help resolve the issue.

How do I determine which CPD main activity area code to use?

"Because an attempt is being made to classify and group a wide range of diverse CPD activities, it is necessarily an artificial and imperfect grouping; there are other equally valid ways of 'slicing the cake'." The names of the main CPD activities are less important than a log of CPD activities that shows participation in variety of activities and in more than one main area. Experience shows that a particular activity could be counted in two or more of the CPD main activity areas. For example, if you prepare and present a webinar, the hours spent in preparation and presentation of the webinar could be logged under SC, short courses and webinars, or CK, contributing to knowledge. As another example, time spent as part of the committee planning and organizing a technical conference or meeting could be logged as CM, technical conferences, etc.; or as IE, industry engagement; or as CK, contributing to knowledge. Pick a category. The summary of the CPD activity should let reviewers/auditors know what you were doing. Assigning all CPD activities the same weighting factor, something more CPD programs are moving towards, eliminates the need to make arbitrary choices. A ***CPD lookup table.xlsx*** file is included on MMSA's CPD website with suggestions on CPD codes for various activities. More important that assignment to a particular CPD main activity area is the description of what you were doing in the Summary of CPD Activity

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Geological Society of London's CPD Mind Map, 2017.

column of the CPD log. In order to help both identify the wide range of potential CPD activities and select an appropriate CPD main activity, the **CPD look-up table.xlsx** file is posted on the MMSA CPD website. Return to Contents.

How many CPD Hours do I need? What if I have QP status in two expertise areas?

Those MMSA members wishing to maintain their **QP** or **CP** status must participate in MMSA's CPD program with the goal of logging a rolling average of 150 CPD hours over a 3-year period including a minimum of 3 professional ethics hours as this amount of CPD may become a requirement for QP or CP status. If you have gained QP status in two or more expertise areas, you will need to log a minimum of a rolling average of 150 CPD hours over a 3-year period in each expertise area. The requirement for a minimum of 3 professional ethics hours over 3 years is not affected by having QP status in multiple expertise areas.

MMSA's CPD system also recognizes that many professionals accumulate more than the minimum required CPD hours each year. If you are diligent in reporting your CPD hours, you may find that you accumulate 100 to 200+ CPD hours each year. Return to Contents.

Converting Semester/Quarter/CEU hours to CPD hours

The academic world focuses on semester or quarter credit hours and an assumed equivalent, Continuing Education Units (CEUs), because these measures focus on the number of class hours per week and the length of an academic term. Most organization's CPD programs, including MMSA's, count the far more easily identified actual contact hours. Most CPD activities occur outside the academic realm: committee meetings, time spend reading professional journals, etc. Academic credit courses are easily converted to contact hours. For example, a 3-semester hour course meets over 13 weeks, so the semester hour to contact hour conversion is:

$$3 \text{ semester hours} \times 13 \text{ weeks} = 39 \text{ contact hours} = 39 \text{ CPD hours}$$

Labs and field trips may add to this total.
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Keeping track of CPD activity hours

The experience of other professional organizations is that the most difficult part of CPD reporting is keeping a log of one's CPD activities. While the required number of CPD hours seems large, it isn't when the QP keeps track of the relevant hours. Keeping track of CPD hours is similar to keeping and turning in time sheets, a necessary part of getting paid (including preparing client bills). Keeping track of your CPD hours is simplified by keeping track of your CPD activities on your personal computer rather than having to log on the MMSA website.

Keeping an easy and simple log of the CPD activity provides the data needed to fill out any CPD reporting log. Use a OneNote™ or Evernote™[2] page with a table format that is easily ported to Excel or other worksheet at year's end for classifying and summarizing information can be used. The data can consist of the following: the date of the activity, the hours spent on the activity, a description of the activity, and the sponsoring organization's name, if relevant. The following list is an actual log for January 2018. The Codes are described in the "What are CPD Hours?" FAQ.

ethics	Code	date	hours	CPD Activity Description
	IE	1/2/18	1	MMSA QP Committee conf call review applicant for QP designation
1	CK	1/5/18	1.5	Ethics paper in AusIMM Bull draft for review
1	IE	1/8/18	1	Review docs for AusIMM Ethics Comm meeting
	CM	1/8/18	1	Denver Mining Club Napoleon coins & 19th century values
1	IE	1/8/18	1.25	AusIMM Ethics Committee conf call
	IE	1/8/18	2	2018 AIPG Annual meeting calls, etc. Reed, Carpenter, Duran
	IE	1/9/18	1	AIPG Colo Section ExCom
1	IE	1/10/18	1	AusIMM Ethics Committee, comments on draft letters
1	SC	1/10/18	0.5	AIPG-AGI GOLI course on ethics codes development
1	CK	1/11/18	1	AusIMM Ethics code versions emails with Helen Milovanovic
1	SC	1/11/18	2	AIPG-AGI webinar prep development of geoscience ethics codes parts 1 & 2
1	SC	1/15/18	3	AIPG-AGI webinar prep development of geoscience ethics codes
	CM	1/15/18	1	DMC subarctic diamond mining

This example log records 17.25 hours of CPD activity for the first half of January alone. The left-hand "Ethics" column contains a "1" used as a flag for time devoted to professional ethics, which totaled 11.25 hours during this period.

The "MMSA's CPD log.xlsx Workbook" and "Keeping Track of Your CPD Activities" headings in the **MMSA CPD program introduction-April 24.docx** file contain instructions on filling out **MMSA's CPD log v 8.xlsx**. Return to Contents.

Complete one CPD worksheet per year

MMSA's CPD Log v 8.xlsx is set up to record the CPD activities of a single year on a single worksheet. Multiple worksheets (tabs at the bottom of the workbook) allow the reporting of multiple years of CPD activity. The Blank worksheet can be copied and pasted into a new worksheet tab for each new year. Note that each year has 480 rows for reporting CPD activities each year.

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[2] OneNote™ is part of Microsoft Office™ and is a handy program for electronically capturing all sorts of information and synchronizing it between your computers and smart phones and tablets. Evernote™ is a similar program that is free at the basic level. Both programs are easy to use.

When reporting for a year is completed, the remaining blank rows can be deleted, particularly if you are going to print your CPD on paper or PDF. Return to Contents.

Do I need to record CPD in all main CPD activity areas?

No. One need not record CPD activity in all 7 CPD main activity areas each year or even over the 3-year rolling average period. However, it is desirable to record CPD hours in several (3+) main CPD activity areas each year. The fact that a specific CPD activity can be logged in more than one CPD main activity area is part of the reason for this flexibility. The summary of each CPD activity provides a record of the variety of activities engaged in and is one of the items that CPD auditors will first check. Return to Contents.

If all CPD activities are weighted the same, why have main CPD activity areas?

There are three reasons for having main CPD activity areas. First, is that CPD programs from a variety of organizations have included main activity areas and want to see them when reviewing an MMSA CPD log. Second, the main CPD activity areas are a means of broadly categorizing CPD activities and help one in thinking about the variety of activities that qualify. The CPD Look Up Table worksheet helps identify CPD activities in far more detail. Third, when a CPD log is audited, the distribution of the number of activities and the percentage of time shown in the CPD summary at the top of each year's log is the first thing an auditor will look at. Participation in a variety of CPD activities is desirable. While the distribution of activities and time will vary from year to year and how one logs a particular activity, the CPD summary provides a quick snapshot of what was logged and can help focus the more detailed review of an audited CPD log. Return to Contents.

Recording CPD activity dates

Different CPD activities occur over different time periods. For activities that occur over a full year, enter only the year in the date column, *e.g.* 2017. For activities lasting several months, enter the months and year, *e.g.* May-Aug 2017 and for activities lasting several days, enter the date range, *e.g.* 02/05-08/17. Return to Contents.

Do I need to obtain certificates of attendance for my CPD hours?

Some CPD programs ask participants to obtain and submit certificates of attendance/participation to document their attendance/participation in professional meetings, short courses, webinars, etc. MMSA does not require such documentation. We believe in the basic honesty of our members. Return to Contents.

How do I acquire Professional Ethics hours?

Professional ethics hours can be acquired in a variety of ways. Being aware of the ethical aspects of talks, articles, discussions, etc. is the key to identifying activities that will count as professional ethics.

Professional ethics includes a wide range of topics. For example, studying the details of a mineral resource and mineral reserve reporting code with which one must comply, or some aspect thereof, can count. Papers on social licensing issues are a potential example. The following list covers some the activities that may count:

- Reviewing professional ethics or conduct codes from various organizations, particularly as these are updated. Compare and contrast the codes. Does a newly revised code contain (a) provision(s) that MMSA's Ethical Guidelines should consider adding?
- Meeting programs—professional organization meetings are increasingly offering talks, short courses, webinars, etc. addressing professional ethics.
- The columns published in professional magazines/journals, such as the President's column, sometimes address professional ethics issues. Reading articles or book on ethical issues in the general media can count. The "Professional Ethics & Practices" column in *The Professional Geologist* is the most obvious example.
- Ethical issues usually do not involve specific technical details—look outside the mining world.

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How do I report Professional Ethics hours?

Professional ethics hours can be obtained in a variety of ways that will easily fit within one of the CPD reporting activities. Professional ethics hours should be recorded in the appropriate activity. However, increasing numbers of professional organizations are requiring the reporting of some minimum number of ethics hours. The MMSA CPD Log contains an "Ethics" column and a "1" should be entered in this column for each activity that qualifies as professional ethics. The "Ethics hrs" summary cell automatically sums all the hours that have be flagged with a "1" in the "Ethics" column. Return to Contents.

What happens if I don't record enough CPD hours?

MMSA will not suspend a QP designation without reading what the QP reports in an explanation of a CPD Activity Log. There are many good reasons why QPs might not log enough hours in a particular period, for example, parental leave, extended illness or injury, or a break in employment. Your CPD activity can help you keep up with your profession through such periods. MMSA is not looking to withdraw QP recognition from those who are clearly trying to comply with MMSA's CPD program. However, repeated and flagrant failure to adequately report CPD information can result in the termination of QP status. Return to Contents.

I spend most of my time managing staff—how can I accumulate CPD that is recognized by MMSA?

As many of us progress in our profession we spend increasing amounts of time managing staff. MMSA recognizes the immense value that senior professionals bring to management roles in organizations, and it is entirely appropriate to enter CPD activities that reflect the acquisition of

management skills and experience. However, even though most of one's time may be in management, keeping up with developments within the mining industry in general and within our various areas of specialty practice is also needed. Reading professional journals, etc. and keeping current with refresher courses in health and safety are requirements for effective managers. Return to Contents.

I am recording CPD using another professional organization's CPD system or my employer's CPD program; do I also need to record on MMSA's CPD reporting log?

If you are recording on an alternative CPD reporting system and do not wish to re-enter CPD data using the MMSA CPD log, you can let MMSA's CPD Committee know what CPD reporting system you are using when your CPD reporting log is requested. Because most CPD programs recognize the same basic types of CPD activities, if another organization's reporting requirements allow ready confirmation that you have met MMSA's CPD reporting requirements, you may submit that other organization's reporting log. Return to Contents.

I work in industry; how can I contribute to knowledge?

Writing papers for publication is not your primary work product and hence you may only occasionally be involved in this area of CPD when you publish a paper/report or give a presentation at a technical meeting or conference. Your contribution to knowledge may more commonly be 'in house' where you transfer knowledge to your colleagues. Such time can be reported as a contribution to knowledge. Return to Contents.

I work in academia; can I record all my teaching time as 'contributing to knowledge'?

Contributing to knowledge is the primary function of academic work; hence most teaching time can be classed as your normal professional activity and is not contributing to knowledge in the sense of developing and presenting new material to the profession. Time spent producing published papers or giving papers at professional conferences or lecture tours at various universities or professional organizations would be classed as contributing to knowledge. It is important that a balanced portfolio of activity is recorded with the learning associated with research activity likely to fall into the category of CPD in Professional Practice. Also see "What about teaching?". Return to Contents.

What about teaching?

If you teach, regardless of level, you will increasingly do so within the framework of recognized skills development. University staff can record activities associated specific learning and achievements in teaching as CPD. Reading and learning in order to develop courses fits under Informal learning. Development of new courses counts as CPD. Presentations and attendance at conferences are CPD. Return to Contents.

I audited a university course that should qualify for CPD credit. How should I report the time spent on this course?

While those auditing courses are not tested, this is a formal course and can be reported under activity FE, Formal Education. Alternatively, reporting attendance at an audited course as activity SC, the untested category, will result in the same amount of CPD credit. Report your CPD activity in the activity category that makes most sense to you. Return to Contents.

I am recording CPD hours for an uncommon activity that I believe constitute valid CPD. How do I report and receive credit for this activity?

Select the main CPD activity category that most closely fits your uncommon activity. Then in the cell in which you report the uncommon activity provide enough description and information about the activity so that an MMSA CPD Auditor can understand what your activity is and why it should be allowed. You may also wish to contact MMSA's CPD Audit Committee as soon as you contemplate reporting this unusual activity to determine whether this activity will be accepted. Return to Contents.

Part of my work involves preparing a Web page for a professional organization that involves internet research, fact checking, editing, etc. How should these activities be recorded for CPD purposes?

One can view such activities as either professional practice (of an administrative variety) or contributing to knowledge. If these activities are a routine part of one's professional time, it may be more appropriate to log these activities as professional practice. This collection and summarization of technical information is acceptable as CPD hours if it is indeed contributing new knowledge to both the compiler of this information as well as the reader of such information. In addition, it could be argued that reviewing technical information on the Internet is like reading an industry magazine or journal. Those reviewing hours could be reported as private reading. The individual QP will be expected to use his/her professional judgement in determining how to record these activities and be prepared to justify his/her decision should a CPD Auditor ask about the activity. Return to Contents.

How much time can I report for putting a professional/technical paper or presentation together?

Putting together a professional/technical paper or presentation involves researching the topic, gathering and assembling the data and information you wish to present, then writing the paper or preparing the PowerPoint™ or other type of presentation. This time plus the time spent actually presenting a talk can also be counted as CPD hours. Return to Contents.

Where do public outreach activities fall?

In the current MMSA CPD reporting system these activities could be logged under either Contributing to Knowledge (activity CK) or Industry Engagement/Service (activity IE). The exact nature of the work being done will assist in determining the appropriate category but the decision is your choice. Public outreach and presentations made to a general public audiences are similar sorts of activity. Washington Fly-ins and similar activities should be reported as Industry Engagement/Service (activity IE). Return to Contents.

Why is my birth month needed?

Your birth month (cell E4) is requested so that if the number of CPD program participants becomes large, it may be necessary to require CPD log reporting on your birth month-year basis rather than on a calendar-year basis. Return to Contents.

Questions and Comments about MMSA's CPD Program

David Abbott is the Chair of the MMSA's CPD Program Committee. He will be happy to answer your questions about the program. If you have suggestions for program improvements, he'd like to receive those as well. Contact him at dmageo@msn.com. Return to Contents.

These FAQs will be updated periodically. See the Web site www.MMSA.org/cpd **for the latest version.**