

SOUTH AFRICAN COUNCIL FOR PLANNERS



The South African
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S A C P L A N

PRACTICAL TRAINING REQUIREMENTS FOR PURPOSES OF REGISTRATION

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PRACTICAL TRAINING REQUIREMENTS FOR PURPOSES OF REGISTRATION

1. INTRODUCTION

The Planning Profession Act, 2002 (Act 36 of 2002) (PPA)¹ provides for three categories of registration:

- Candidate Planner;
- Technical Planner; and
- Professional Planner.

The PPA requires 24 months of practical training, which can only commence after the candidate has completed the necessary accredited planning qualification. The purpose of this practical training is:

- To ensure that before registration, a person develops (or demonstrates) the ability and achieves competency in applying theoretical concepts and academic knowledge of the nature of professional responsibility, and
- To obtain experience in practical planning and to gain knowledge of the nature of professional responsibility. The basic requirement for any category of registration is a SACPLAN accredited academic planning qualification relevant to each of the categories of registration.

To be registered as a Technical Planner or a Professional Planner a person is therefore required to have both a recognised academic planning qualification and have completed the required period of practical training. Applicants must therefore be able to demonstrate that they have obtained the required practical training under the supervision of a registered Professional Planner if they wish to register as a Professional Planner, or demonstrate that they have obtained the required practical training under the supervision of a registered Technical Planner or Professional Planner if they wish to register as a Technical Planner.

In addition, it is necessary to have been registered as a Candidate Planner for at least two (2) years².

2. PRACTICAL TRAINING

Every applicant that wishes to apply for registration must, after obtaining a recognised planning qualification, have completed a period of practical experience. This experience covers urban, regional, and rural planning work and is required so that a person who is registered has some knowledge of applying urban, regional, and

¹ As amended from time to time

² Rule 15(6) of the SACPLAN Rules

rural planning theory and principles in practice and of acquiring a professional method of undertaking planning work. For these reasons the required practical training must satisfy the following criteria:

- The practical training must be for a total effective period of at least 24 months³.
- The minimum effective period of 24 months practical training must be undertaken after obtaining the relevant planning qualification⁴.

The practical training must be undertaken under the guidance of a registered Professional Planner in good standing in respect of a person registering as a Professional Planner, or under the guidance of a Technical Planner in good standing or Professional Planner in good standing for a person registering as a Technical Planner. This means that the practical training must be done by the person whilst employed by or working with or for or in collaboration with the appropriately registered planner.

Based on Core and Functional competencies, SACPLAN has identified different types of planning work for purposes of practical training requirements for registration. These are divided into four categories:

- A - Survey and research
- B - Plan formulation
- C - Plan implementation and administration
- D - Other planning work in related fields

Professional Planner:

To be registered as a Professional Planner, an applicant will be required to have:

a minimum package of an effective period of 24 months (actual time) with at least

- (a) Six (6) months in each of Categories A, B, and C, (covering a minimum of two types of work in each of the Categories) and the balance covering other types of work in any of the Categories.

or

- (b) Eight (8) months in each of Categories B, and C, (covering a minimum of two types of work in each of the Categories) and the balance covering other types of work in any of the Categories.

³ Rule 15(3) of the SACPLAN Rules

⁴ Rule 15(7) of the SACPLAN Rules

The applicant must also demonstrate development from working under the guidance of a supervisor towards being able to work independently.

Technical Planner:

To be registered as a Technical Planner, an applicant will be required to have:

a minimum package of an effective period of 24 months (actual time) with at least

- (a) Six (6) months in each of Categories B, and C, (covering a minimum of two types of work in each of the Categories).
- (b) At least three (3) months in
 - Planning surveys and analysis, and
 - Operational surveys,
- (c) The balance in any of the Categories (covering a minimum of two other types of work).

General – Applicable to both Professional Planner and Technical Planner applications.

- Applicants will be required to have passed the relevant examination once implemented.
- Applicants must take note the reference to months above refers to actual (effective) time of experience obtained.
- When applying for registration SACPLAN requires particulars of the practical training which has been undertaken in the form of a comprehensive "practical training report". This report must describe the following:
 - the type of planning work;
 - the name or description of the project/s;
 - the extent or scale of the project/s;
 - the applicant's work responsibilities (it must be clearly stated what the applicant's specific professional planning related responsibilities were); and
 - actual time spent (in months or parts thereof) on each type of planning work and should be based on the guidelines for practical training set out below.

3. GUIDELINES FOR PRACTICAL TRAINING

The purpose of practical training is twofold. Firstly, to ensure that before registration, a person develops the ability and achieves competency in applying theoretical concepts and academic knowledge to planning in practice across a variety of relevant functional areas and work categories. Secondly, to obtain experience in practical planning and to gain knowledge of the nature of professional responsibility. To assist applicants in describing and summarising their practical training the SACPLAN has identified different types of planning work for purposes of Practical Training Requirements for Registration.

The four categories as mentioned above are:

- A - Survey and research
- B - Plan formulation
- C - Plan implementation and administration
- D - Other planning work in related fields

Category A: Survey and research

The following sub-categories forms part of Category A:

- Planning surveys and analysis (excluding related 'academic work').
- Operational surveys (excluding related 'academic work').
- Data collection, compilation, analysis and interpretation (excluding related 'academic work').
- Development potential evaluation.
- Planning research (excluding 'academic work').
- Academic work (further studies, teaching, publications).

Category B: Plan formulation

The following sub-categories forms part of Category B:

- Policy development and formulation.
- Strategic spatial planning.
- Spatial planning at different scales and in different contexts (see Figure 2 in Competency Guidelines)
 - National.
 - Sub-National.
 - Sub-regional or District.
 - Urban.
 - Rural.
 - Local.

- Layout plans, township plans, land development plans.
- Land use planning.
- Housing and informal settlement upgrading.
- Rural development.
- Integrated development planning.

Category C: Plan implementation and administration

The following sub-category forms part of Category C:

- Land use management.
- Land use schemes.
- Preparing, motivating and evaluating applications in terms of land use schemes.
- Development control.
- Consent use in terms of statutory requirements.
- Administration and coordination of development applications.
- Appeals.
- Planning law.
- Plan evaluation.
- Management of development processes.
- Site development planning.

Category D: Other planning work in related fields

The following sub-category forms part of Category D:

- Facilitation, negotiation, mediation and arbitration.
- Environmental management.
- Urban design.
- Transportation planning.
- Infrastructure planning.
- Property development and management.
- Project management.
- Corporate strategic planning.
- Project development and business plans.
- Other planning work (not more than 3 months).

Two important points in this regard should be noted:

- The list of work types is not exhaustive. Any planning work which does not fall within the descriptions of the various work types should be listed under "Other planning work" with its own suitable description. The applicant will be required

to provide sufficient detail on the work being claimed and must ensure that such training does not fall within the scope of any of the listed sub-categories.

- Although the various work types are divided into four categories it is possible that a type of planning work could fall under more than one of the categories. Applicants, when preparing their "practical training report", should clearly indicate the category to which the work (or part of the work) has been allocated. A summary of the total practical training undertaken should also be submitted and applicant should note that the total time of practical training shown on their summary of work done cannot be more than the period during which the practical training was undertaken. In this regard it is recommended that Candidate Planners keeps a time sheet of practical training work undertaken, and that such timesheet be evaluated on a continuous basis by the approved supervisor(s) in assisting the correct allocation of time experience.

CATEGORY A: SURVEY AND RESEARCH

1. Planning surveys and analysis

Survey and analysis comprise the systematic study of any activity forming the basis of land use or socio-economic planning decisions on behalf of any private, public or academic institution. Such surveys are essentially performed in conjunction with communities and include the scientific collection, compilation, analysis and evaluation of data. Such data, once collated and verified at community level, is used for projections of population, education, health, housing, recreation and environmental needs as well as for economic activities, employment, government policy, etc. In other words, this category of work will lead to a report that deals with the aims and objectives of the community as well as the most important policy aspects of the applicable authority, together with recommendations for the execution of general or specific town and regional planning policy. Related 'academic work' is excluded.

2. Operational surveys

Any other surveys not included under Planning Surveys or related 'Academic work' such as planning support science, geospatial information and earth observation technology use/application.

3. Data collection, compilation, analysis and interpretation

The collection of any secondary data and the analysis and interpretation of the secondary data, as well as the interpretation of operational surveys and data, and includes data capturing. Related 'academic work' is excluded.

4. Development potential evaluation

This type of work comprises the evaluation of environmental influences as well as the economic and social implications of any public or private development or proposed development. Included in this work type are the processes that are contained in evaluating the way in which money is spent on development projects and evaluating whether the effort has attained the stated goal. A consequence of evaluation is the possible feedback of information to future initiatives to attain better efficiencies.

Development potential evaluation also includes land economics. In the process of land economics, the planner will be responsible for presenting to his clients analyses of economic phenomena relating to land and the use of land in accordance with given town planning and other restraints. These analyses will be preceded by prior participatory consultation with communities. Such examinations will include a statement on the importance of the desirability of the use of land and will include analyses of supply and demand, benefit and cost, best case scenarios and the like.

The process will also include the presentation of business plans for the most optimal use and development of land.

5. Planning research

The research includes the detailed study of a particular subject which contributes to the knowledge and broader understanding of, inter alia, the conceptual, theoretical and/or practical elements of socio-economic, physical and environmental planning and development for implementation at the urban or regional levels. Research is generally, but not exclusively carried out under commission and/or at an acknowledged research establishment. This category does not include the surveys and analyses in other types of work included in this guideline, as well as 'academic work'.

6. Academic work (further studies, teaching, publications)

This type of work includes practical research (at a recognised planning school) in the conceptual elements of developmental, socio-economic, physical and environmental planning and the application of appropriate techniques in urban and/or regional and/or rural planning. Instruction in disciplines related to such research in town/urban and regional planning such as spatial economics, regional economics, urban studies, small-scale farming, rural development etc., at a recognised planning school or related school is included in this type of work. The academic work done through a mini dissertation shall be limited to 3 months, while academic work through a full dissertation shall be limited to 6 months.

CATEGORY B: PLAN FORMULATION

7. Policy development and formulation

Policy development and formulation includes the identification of the policy challenge or opportunity, formulation of the aims and objectives, stakeholder engagement, write-up and compilation of actual policy and accompanying investment framework on core planning functions and related disciplines by private corporations or governmental agencies and includes a report which defines these aims, objectives, policy aspects and recommendations.

8. Strategic spatial planning

Includes all strategic spatial planning (e.g. National, Provincial or Local Growth and Development strategies), not included under sub-category 9 hereunder.

9. Spatial planning at different scales and in different contexts (see Figure 2 in Competency Guidelines)

9.1. National

At National level spatial planning is directed at the achievement of stated economic and social objectives making the best use of both natural and human resources. In this national physical planning action the following aspects, inter alia, receive attention: national traffic and transportation systems; provision of water and energy; utilisation of mineral, marine and other resources; human settlements, which include housing, informal settlements and urbanisation; agricultural development; conservation of the environment; infrastructure provision, economic priorities. Planning at this level sets priorities on both a sectorial and regional basis to serve as guidelines for planning at other levels. Because planning at National level is largely policy formulation and is seldom concerned with specific development projects, it can, for the most part, be regarded as structure or strategic planning⁵. Monitoring, coordination and evaluation of Spatial Development Programme implementations, including cross-boundary (provincial and country) as envisaged in the NSDF.

9.2. Sub-National

Planning at Sub-National level will take provincial boundaries into consideration and will use these as planning regions. Principally, the same spatial elements as used for structure planning at National level will serve as guidelines in preparing regional spatial plans. However, more detailed attention is given to these elements at regional level. Of particular importance at this level, is the creation of a framework for future

⁵ See Sections 13 and 14 of SPLUMA

population settlement and an important prerequisite for this is the quantification of human settlements in anticipated urbanisation and the creation of jobs⁶.

9.3. Sub-regional / District

Planning at this level places greater emphasis on the social, economic and physical needs of development and consequently, the guidelines contained in national and regional plans have to be modified and adapted to the particular social, economic and geographic characteristics and development problems of the sub-region concerned. Sub-regional plans could therefore differ considerably in content resulting from the constant need to accommodate local circumstances as these are manifested by communities and individuals on the ground. In these plans, the use to which specified portions of land are put to provide specially for social and infrastructural requirements, is more specific, thus crystallising more clearly projects for implementation over a shorter period⁷.

9.4. Urban

The urban Spatial Development Framework plan concerns the physical planning of a single urban area or a functionally interrelated complex of urban centres. Whilst the arrangement of land uses is usually the main element, the associated needs of communities as identified by them and expressed for example in the form of transportation, education, health, job opportunities, residential, recreational and other requirements form essential aspects of this planning process. Development priorities and the intensity of land uses, capital expenditure frameworks, and social and community based investment plans, are further important components of this type of plan. At this level of planning the basic requirements of involving communities in the processes of land development will be entrenched. This will impact on future actions in the process of development facilitation.

9.5. Rural

A Spatial Development Framework plan developed as a separate plan with a rural emphasis for an area not included under sub-category 9.4.

9.6. Local

Local precinct Spatial Development Framework plans concern planning within the area of jurisdiction of a local authority. Whilst these plans deal with the same subject as urban spatial plans, they are more specifically community based and planning proposals are therefore usually set out in greater detail. Planning at this level usually has a strong developmental element and is driven by expressed community and

⁶ See Sections 15, 16, 18 and 19 of SPLUMA

⁷ See Sections 20 and 21 of SPLUMA

individual needs which are quantified in planning proposals. Such planning proposals will entertain such needs of communities and active participation of communities is encouraged. Local precinct Spatial Development Framework plans in the form of policy statements can be prepared and are obviously confined to proposals aimed at solving specific issues and development problems (e.g. precinct plan).

10. Layout plans, township plans, land development plans

In the main, this plan shows in detail the proposed development to be undertaken for communities by public or private developers. The documentation includes sufficient detailed information to explain the proposed development and how it will affect or be affected by the adjoining existing or proposed developments with reference to services and design standards/criteria. This category includes, inter alia, a proposed layout for uses such as housing, industrial, commercial, etc., a land development application, a redevelopment or urban renewal scheme, a scheme for the upgrading of existing settlements, or a plan proposing a specified land use e.g. recreation, shopping, etc.

11. Land use planning

Includes land use policy planning on a specific local level e.g. density policy for the local area, localised corridor or node, and includes land use planning at an urban design level, etc.

12. Housing and informal settlement upgrading

Housing is a multi-disciplinary activity in which the planner will play a leading coordinating role in conjunction with many related professions. This coordination will be essential to ensure that numerous activities are brought together to achieve the most efficient and optimally suitable delivery of human settlements. In the process, cognisance will be taken of social and welfare needs including studies of age, gender, income, religion, language and the like, relating to each community. In all cases, in the provision of land, services and housing, a clear understanding of community needs must first be obtained and expressed most typically in reports and actions reflecting affordability and the ability of communities to be involved in the process of delivery. A process of participation and capacity building will be pursued in order to empower communities to perform similar functions by themselves at a later date. A sensitivity towards related professions involved in human settlements / housing such as architecture, engineering, finances, quantity surveying, sociology, social welfare, public health, and local government, will be essential.

13. Rural development

This type of work comprises the analysis of and proposals for rural development and livelihoods, agricultural and small-scale farming development and includes

participatory consultation with communities to enable the realisation of economic, social and physical aspects of sustainable and resilient rural development. The influence of appropriate community development projects in terms of broad rural and urbanisation policies must be taken into account.

14. Integrated development planning

As determined in the Municipal Systems Act, 2000 (MSA) the Spatial Planning and Land Use Management Act, 2013 (SPLUMA), the District Development Model (DDM), and relevant provisions in the National Environmental Management Act, 1998 (NEMA) as it relates to various aspects of integrated development planning and relevant municipal annual reporting.

CATEGORY C: PLAN IMPLEMENTATION AND ADMINISTRATION

15. Land use management

Land use management not included under sub-categories 16 – 25 (e.g. Township establishment, subdivisions, and removal of restrictive conditions).

16. Land use schemes

Preparing of Land Use Scheme at a municipal level work of this type includes defining and demarcating of specified use zones and the regulations applicable to permissible density and coverage, height, floor area ratio, building lines, parking, etc., in each zone. Legal provisions including protection for objection and appeal, yet ensuring continuous amendment of the planning scheme is essential. In this category, policy matters relating to the search for more appropriate and flexible town planning scheme measures are included. Control over or evaluation of development applications is not included in this activity but under sub-category 17.

17. Preparing, motivating and evaluating applications in terms of land use schemes

Includes applications typically referred to as amendments scheme applications or rezoning applications. Control over or evaluation of development applications. Applications under sub-category 19 are excluded.

18. Development control (including inspection and enforcement)

Work of this type concerns the professional control over statutory town/urban and regional planning documents such as Spatial Development Framework plans, zoning schemes, town planning schemes, building regulations, health regulations or any statutory control measure in terms of one or other legislative provision aimed at controlling the use or development of land whether or not this document is still in process of preparation or has already been finalised and also includes the administration of amendments to these documents. The relevant work deals principally with administration and covers the rules of procedures for town/urban and regional planning. In addition, this type of work also includes appearing as a member of or counsel before any court, tribunal, board or council of appeal established in terms of any legislation to control any statutory instruments or regulations relating to the use and development of land. Included in this activity is the role that planners play in acting as a representative of a group, community or client in an adversary capacity before such court, tribunal, board or council of appeal, duly created in terms of any legislation.

19. Consent use in terms of statutory requirements

Motivated applications for the approval and amendment of land uses in terms of specific legislation are regarded as part of this category.

20. Administration and coordination of development applications

Includes all administration and coordination of development applications at a municipal level, including keeping of planning applications registers, administering of development applications comments (internal and external), and administration of decision making processes for Municipal Planning Approvals.

21. Appeals

Any appeals, land use applications related appeal prepared and submitted (including giving of evidence), including the preparation of appeals, opposing appeals and the hearing of appeals.

22. Planning law

In this instance, the planner will be called upon to present draft planning legislation, regulations, by-laws or any other statutory instruments. The planner's involvement will also include preparing comments on proposed legislation relating to planning law and related law (e.g. environmental, transportation, mineral exploitation, agriculture etc.) at central, regional or local levels of activity. The legislation may be in the form of amendments to existing legislation or may refer to completely new legislation. The planner will be expected to present proactive changes where it has been found that there is a need.

23. Plan evaluation (or impact assessment)

Work of this type includes the evaluation of various plan proposals with a view to determining impact or advice on the best solution to any problem, given any restraints that may apply to a given piece of land, available finances, social parameters and the like.

24. Management of development processes

Management of development processes implies the coordinated leadership provided by a planner in a multi-disciplinary development activity. In this process, the planner is the catalyst who ensures that the responsibilities and activities of functional line departments (in the central, regional, provincial/sub-national or local government) and other providers of services are coordinated in a development situation. Such

coordination must take place at their specific levels of service rendering to ensure efficient and optimal joint supply of services and activities in such development.

25. Site development planning

Preparing or developing Site Development Plans. Site planning includes the organisation of access, circulation, privacy, security, shelter, land drainage, environmental considerations, urban design, landscape design and other factors. Work on urban renewal or redevelopment processes are included where it relates to the aspect listed above.

CATEGORY D: OTHER PLANNING WORK IN RELATED FIELDS

26. Facilitation, negotiation, mediation and arbitration

This includes the numerous activities involved in ensuring that broad participation in the planning process takes place. The activity involves mediation between adversaries which occur in the process of planning and take place under circumstances where negotiation skills are essential.

27. Environmental management

The planner will be involved in the process of integrated environmental management considerations at all stages of a particular development process in order to achieve the benefits of development with minimal harm to the environment. Included in this work type is the preparation of integrated environmental studies or environmental management frameworks (EMFs) in accordance with guidelines set by the relevant authorities.

28. Urban design

In this type of work, the design of urban development of some magnitude is dealt with. The work is principally three dimensional in nature and includes the physical form of buildings and the space between buildings, and also includes landscape considerations, access roads, the technical implications of services and infrastructure, questions relating to feasibility, design standards and site valuation. The land use relationship between buildings is an important consideration. The culmination of this work type is typically the preparation of a site development plan.

29. Transportation planning

This type of work comprises the land use planning portion of transportation planning within an integrated transportation plan. The work covers comprehensive integrated transport plans, integrated transport plans, non-motorised transport (NMT) bus rapid transit, transit orientated development plans as well as strategic transportation plans such as master transport plans etc. This also involves the carrying out of pedestrian or traffic impact studies in relation to proposed new developments e.g. a shopping mall, a new residential suburb etc.

30. Infrastructure planning

This type of work typically includes planning, design and provision of infrastructure and services including the operation and maintenance plans necessary in support of sustainable infrastructure and services planning in human settlements and ecosystems. Such work can take the form of the implementation and coordination of job creation projects under the Expanded Public Works Programme, Implementation

of the Rural/Urban Roads Asset Management System etc. Infrastructure and service planning can operate within the confines of small, large and complex environments covering various scales (micro, meso and macro) and geographic areas (urban, regional or rural). Thematic infrastructure focus areas could be roads, housing, energy, waste, biodiversity, ecological infrastructure etc.

31. Property development and management

The type of work comprises the submission of recommendations for the economic use of land and buildings for various land uses and the development of a specific property in accordance with a land use plan either by direct investment or by the active coordination or investment by private and public corporations. This may include value capture, value lift interventions, and urban management.

32. Project management

In this instance, the planner will be the central figure (leader) in a multi-disciplinary team which must be created to guide a development project from inception, through approval by the appropriate authorities, to fruition. The work will entail the assembly of the talents of various related professions whose actions will be coordinated in to a programme to produce a harmonious action to effectively implement the client's needs. In this instance, the management of schemes to promote the optimal development of land for communities will be paramount. Such development may take place in urban areas in the form of development facilitation and in rural areas where the development of small-scale farming and community upgrade schemes may take place. Other areas of activity are in property development as well as land assembly for formal development.

33. Corporate strategic planning

In this type of work, the practitioner will be central in the process of formulating strategic proposals for the physical utilisation of land, buildings, infrastructure and superstructure of a client. The proposals will include a business plan implying a budget and programme for development and will be based on a physical plan indicating the socio-economic development targets of the client.

34. Project development and business plans

In this type of work, the practitioner will be central in project planning, design, development, management and sustainability including the development of business plans. The work involves from project conception to implementation including monitoring and evaluation for sustainability. Project activities identified are identified within the scope of a log frame, with the incumbent expected to oversee all project components in an integrated, holistic manner, to ensure that the project meets its stated objectives and contributes to an envisaged vision. The components of a

successful project include managing relationships with various stakeholders (project participants, partners, governments, donors, international members, and internal stakeholders, etc), managing human resources, managing financial resources, facilitating learning, managing risks and ensuring flexibility. The projects can be small, large and complex and cover various scales (micro, meso and macro) and geographic areas (urban, regional or rural).

35. Other planning work

Planning work which does not fall in any of the above categories can be listed under this item.

This type of work comprises land use planning work and/or design work or other activities in town/urban and regional planning which do not fit into the above-mentioned categories, but which could be approved by the Council conditional upon full details and examples of such work being submitted for inspection in order to allow the Council to judge whether or not the work is of such magnitude, type and standard that it could validly be regarded as town/urban and regional planning experience. Actual time claimed under this sub-category may not be more 3 months.