The TPS Professional Development Scheme

Being a PDS Mentor
Guidance and Support

July 2015

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For further information, please contact:
>   The Secretary
>   The Transport Planning Society Ltd
>   1 Great George Street
>   London SW1P 3AA
>
>   pds@tps.org.uk

Acknowledgements

In drafting this Guidance, we have benefited from contributions made to Scheme management by the users of the Scheme, building on their experience as well as that of the Society since it was launched in 2008.

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As a TPS Professional Development Scheme mentor you are required to be pro-active in working with your trainees, meeting with them at least once every three months:

- encouraging them to keep good, up to date records,

- reviewing recent progress,

- being satisfied that completed Objectives meet the requirements,

- guiding them on future progress through the PDS,

- helping them assess which professional qualification best suits them,

and working with others within your organisation to help your trainees obtain the breadth and depth of learning and experience they need.

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Contents

A   Introduction

A1   Being a PDS Mentor

A1.1   Being a PDS mentor is both challenging and rewarding.

A1.2   It is challenging because you need to:
- be willing and able to make the time to work with your trainee, or trainees,
  - whenever they feel they need advice.
  - to meet with them to discuss progress at least once every three months.
- have a thorough understanding of the PDS, in particular:
  - its structure.
  - the completion requirements.
  - how trainees should record their progress.
  - how that progress should be assessed and Objectives signed off.
- attend an initial PDS mentor training session,
  - and attend refresh sessions at the required intervals.
- understand your trainee(s). In particular, understand their:
  - existing competences.
  - current work.
  - ambitions.
  - strengths and weaknesses.
  - the opportunities to complete the PDS.
- be willing and able to work with others in you organisation to create opportunities for your trainees to obtain the breadth and depth of knowledge and experience they need to complete the PDS.
- have a good understanding of the possible routes to professional qualification open to your trainee(s),
  - in particular the TPP, but also CEng and CMILT.
- know where to go and who to go to for information and help.

A1.3   As a PDS mentor, you must be pro-active with your trainees:
- being ready to take the initiative in arranging meetings,
- encouraging your trainee to keep good and up to date records.
- reviewing recent progress,
- being satisfied that completed Objectives meet the requirements,
- guiding your trainees on future progress through the PDS,
- helping them assess which professional qualification best suits them.
- ensuring your trainees are ready, with a set of completed records, for planned visits by a PDS Reviewer.
- providing feedback to them.

A1.4   It is rewarding because you will be helping young transport planners to develop their skills, to become competent professionals and progress their career.

A2 The Value of Following the PDS and being Awarded a Professional Qualification

A2.1   Those entering transport planning with a civil engineering or town planning degree will have had the importance of progressing to CEng or MRTPI, and of following a professional development programme after graduating, impressed upon them. They are likely to understand why following a training scheme like the PDS, and progressing to a professional qualification makes sense.

A2.2   However, many graduates in transport planning come from a discipline in which there is no similar professional structure, and some need to understand the value of a training scheme, such as the PDS, and of a professional qualification, such as the TPP, before being ready to commit to the PDS and on to award of the TPP.

A2.3   Points that might help them include:
- being on the PDS means that:
  o their employer has undertaken to do their best to provide them with opportunities to gain the breadth of knowledge and experience required for Scheme completion.
  o they are committed to making good use of those opportunities
  o they have a mentor who is committed to guiding them through the early years of their career.
- even if they think they want to specialise, by following the PDS they can obtain an understanding of the breadth transport planning, which will help them appreciate the 'bigger picture' as they develop their specialism.
- award of a professional qualification defines someone as a true professional, with a wide range of technical and management competences.
- the TPP is a qualification that specifically identifies professional transport planners. Although other professional qualifications, such as, CEng, CMILT and RTPI, are valuable, they cover a different range of skills, which are less appropriate to transport planning.
- employers and organisations commissioning transport planning work are increasingly likely to show a preference for those with the TPP, particularly for those planners giving evidence in public on transport planning policies and plans.
- In due course they will compete in a market in which others may well have the TPP qualification.

A3 The Purpose and Structure of this Mentor Guidance

A3.1 This Guidance is intended to provide PDS mentors with key information they will, or might, need as they work with the trainees, from starting the PDS to completing it, and then progressing to a professional qualification.

A3.2 It is structured in Parts, eleven in total, from A (this Introduction) to K (Support for Mentors) each dealing with a particular aspects. Each Part consists of a series of Sections.

A3.3 The Parts are:
A   Introduction.
B   The Rationale for and Structure of the PDS.
C   The PDS Units and the Completion Requirements.
D   The Objective Record Sheet and Recording Progress.
E   Assessing Progress.
F   CPD.
G   The PDS Review Process.
H   Progress from the PDS to the TPP and other Professional Qualifications.
I   The PDS Trainee.
J   The PDS Mentor.
K   Support for Mentors.

A3.4 The structure is intended to enable the Society to replace or update individual Parts if and when the need arises.

A4 Abbreviations Used

A4.1   The following abbreviations are used:
- TPS – the Transport Planning Society.
- PDS – the TPS Professional Development Scheme.
- TPP – the Transport Planning Professional qualification.
- PTK – the TPP Portfolio of Technical Knowledge.
- ICE – the Institution of Civil Engineers.
- CIHT – the Chartered Institute of Highways and Transportation.
- CEng – Chartered Engineer.
- CILT – the Chartered Institute of Logistics and Transport.
- CMILT – Chartered Member of CILT.
- RTPI – the Royal Town Planning Institute.
- MRTPI – Member, Royal Town Planning Institute.

B The Rationale for and the Structure of the PDS

B1   The Background to the PDS

B1.1   The PDS is based on National Occupational Standards (NOS) for Transport Planners, prepared by the Society and GoSkills, the then Sector Skills Council, and approved by the regulatory authorities (OfQual in England) in 2007. The same NOS provide the basis for the TPP qualification provided by the Society together with CIHT. Both the PDS and TPP were launched in 2008.

B1.2   The Scheme and the TPP were developed to meet a need for:
- a standard training scheme that could be used by employers in all sectors, and
- a professional qualification specific to transport planning.

Availability of the PDS

B1.3   The PDS is available to all organisations that are paid up Stakeholder members of the Society and have a license to use the PDS. A full list of licensees is at www.tps.org.uk/main/professionaldevelopment/

B1.4   Any member of staff who is committed to developing their career as a professional transport planner and is a paid up individual member of the Society can follow the PDS, wherever they are based.

B1.5   Trainees who have satisfied the Society that they have completed the PDS are awarded a Certificate of PDS Completion. However, this Certificate is only available to those trainees who have been assessed by one of the Society's PDS Reviewers. The Society's Review Process is limited to the UK and, subject to prior agreement, the Republic of Ireland.

B1.6   Trainees who have a UK honours degree, or its equivalent, and a Certificate of PDS Completion are considered to have satisfied the Knowledge requirements for award of the TPP and do not need to complete a TPP Portfolio of Technical Knowledge (PTK) before progressing to their Portfolio of Evidence and Professional Review Interview.

The Key Players - the Employer, PDS Manager, Mentor, Trainee and TPS

B1.7   There are five key players in the PDS, the Employer, the PDS manager, the PDS mentor, the PDS trainee and the Society.

B1.8   The employer is central as by adopting the Scheme they have made a commitment to the professional development of their younger transport planners and thus to provide:
- the opportunities the PDS trainee needs to obtain the breadth and depth of knowledge and experience required for Scheme completion.
- their trainees with a PDS mentor who has the time and resources to guide each trainee through to Scheme completion.

B1.9   Each licensee appoints a **PDS manager**, who is the main contact between the licensee and the Society.

B1.10 The PDS Manager is responsible for managing the PDS within the organisation, including:
- keeping up to date with PDS practice and documents.
- identifying possible trainees and getting them signed up.
- identifying mentors and ensuring they are up to date with their PDS mentor training.
- ensuring each trainee has a mentor.
- monitoring the training needs of the mentors.
- monitoring the performance of mentors.
- ensuring that both their mentors and trainees are aware of and have ready access to all relevant PDS documents.
- working with their mentors and trainees to ensure that trainees are ready, with a complete set of up to date records, for planned visits by a PDS Reviewer.
- maintaining the organisation's PDS Register, which provides the information on their mentors, trainees and offices needed by PDS Reviewers.
- attending the Society's twice yearly PDS managers' workshop, or arrange for someone to attend in their place.

B1.11 The **PDS mentor** has a very important role – it is the mentor who enthuses, guides, cajoles, and assesses the trainee. Part A provides an overview of their responsibilities and work, which is described in more detail in Part J.

B1.12 The **PDS trainee** is at the heart of the PDS, but to be successful, to complete the PDS, they need to be committed to:
- developing their career as a professional transport planner in a structured manner.
- seeking and making good use of opportunities to obtain the breadth and depth of knowledge and experience required for Scheme completion.
- keeping up to date records of their learning and work.

B1.13 The **Transport Planning Society** is responsible for:
- providing up to date information, guidance and documents, including:
  o running the twice yearly PDS managers' workshop.
  o managing the PDS mentor area of the Society's website.
- training PDS mentors.
- reviewing PDS operation within each licensee to ensure standards are being met.
- responding to all queries about the Scheme.
- promoting the Scheme to possible new users and helping them get up and running.

B2   The PDS Structure

B2.1   The PDS consists of 80 Objectives:
- which are grouped into18 Units.
- which are grouped into 6 Areas.

B2.2   Some of the Units:
- are Mandatory,
  - others (Optional) provide a set from which choices can be made.
- cover technical knowledge and experience,
  - others are about generic skills, such as management, communication and ethics.

B2.3   The six Areas are
- Policies and Regulations, PR.
- Tools and Techniques, TT.
- Planning and Design, PD.
- Operations, O.
- Management, M.
- Communication, Commitment and Ethics, CCE.

B2.4   The Mandatory Units are
- Policies, PR1.
- Regulations, PR2.
- Data, TT1.
- Transport Modelling and Analysis, TT2.
- Transport Assessment, TT3.
- Public Engagement, TT4.
- Personal and Inter-Personal Management, M1.
- Leading and Managing Teams, M2.
- Planning and Managing Projects, M3.
- Procuring Projects M4, *Alternative to M5*.
- Project Proposals M5, *Alternative to M4*.
- Communication, CCE1.
- Commitment, CCE2.
- Ethics and Values, CCE3.

B2.5   The Optional Units are:
- Strategic and Master Plans for Transport, PD1.
- Transport Scheme Design, PD2.
- Travel Planning, O1.
- Commercial and Operational Management, O2.

B2.6   A list of the Objectives for each Unit is included in Table B2.

The PDS Competence Levels

B2.7   Each of the PDS Objectives is associated with one or two levels of competence, of which there are four

- **Awareness**   Requiring a general understanding of the Objective, including an appreciation of its relevance in the context of a transport planner's work.

- **Knowledge**   Requiring sufficient knowledge and understanding of the principles underlying an Objective, and how they relate to practical applications, to be able to undertake tasks competently.

- **Experience**   Requiring a consistent ability to carry out standard work within the Objective competently when under supervision

- **Proficiency**   Requiring a consistent ability to carry out work within the Objective competently without supervision, and to supervise others.

B2.8   Objectives are either about 'learning' or 'doing'. They are never about both learning and doing.

B2.9   Some 'learning' Objectives are about both Awareness and Knowledge while others are just about Knowledge, requiring Knowledge across a narrower range of topics than that for which Awareness is necessary.

B2.10 All 'doing' Objectives are about Experience, with some requiring the trainee to have progressed through Experience (working under supervision) to Proficiency (being able to supervise others, or work without supervision).

B2.11 The words 'requiring a consistent ability' are central to the definition of both Experience and Proficiency. They require a trainee to demonstrate Experience or Proficiency across a range of projects.

The Objectives and the Associated Levels

B2.12 Table B2.1 provides a list of all the PDS Objectives together with the level of competence required – Awareness and Knowledge, Knowledge, Experience, Experience with Proficiency as an option, or Proficiency as a Mandatory requirement. The Table is in two parts, the first part covers the Mandatory Units, the second part the Optional Units.

Table B2
The Mandatory Units and Objectives

No	Title	Required Competence Level
PR1	**Policies**	
PR1.1	National, regional and local policies	Knowledge
PR1.2	Transport in the wider world	Knowledge
PR1.3	Transport governance	Knowledge
PR1.4	Planning procedures	Knowledge
PR1.5	Finance for transport	Knowledge

No	Title	Required Competence Level
PR1.6	Planning transport projects in line with policies	Experience
PR1.7	Financing transport schemes	Experience
PR1.8	Monitoring the performance of transport projects in a policy context	Experience
PR2	**Regulations**	
PR2.1	Equality and disability requirements	Knowledge
PR2.2	Health and safety requirements	Knowledge
PR2.3	Transport requirements	Knowledge
PR2.4	Environmental impact requirements	Knowledge
PR2.5	Development planning requirements	Awareness and Knowledge
PR2.6	Applying equality and disability requirements	Experience
PR2.7	Applying health and safety requirements	Experience
PR2.8	Applying transport requirements	Experience
PR2.9	Applying environmental impact requirements	Experience
PR2.10	Applying development planning requirements	Experience

No	Title	Required Competence Level
TT1	**Data**	
TT1.1	The principal sources of transport statistics and data	Awareness and Knowledge
TT1.2	The relationship between data and its intended application	Awareness and Knowledge
TT1.3	Data collection methods	Knowledge
TT1.4	Survey processing and analysis principles	Awareness and Knowledge
TT1.5	Using existing sources of data	Proficiency
TT1.6	Managing traffic and transport surveys	Proficiency
TT1.7	Analysing, interpreting and reporting transport survey data	Proficiency
TT2	**Transport Modelling and Analysis**	
TT2.1	Transport modelling principles	Knowledge
TT2.2	The role of data in modelling	Knowledge
TT2.3	Modelling software	Awareness and Knowledge
TT2.4	Developing a transport model	Experience
TT2.5	Preparing transport forecasts	Experience
TT2.6	Principles of analysis techniques	Awareness and Knowledge
TT2.7	Analysis software	Awareness and Knowledge
TT2.8	Using analysis techniques	Experience
TT.3	**Transport Assessment**	
TT3.1	Transport assessment principles	Knowledge
TT3.2	Assessment software	Awareness and Knowledge
TT3.3	Using assessment techniques	Experience
TT3.4	Monitoring principles	Awareness and Knowledge
TT3.5	Monitoring programmes	Experience

No	Title	Required Competence Level
TT4	**Public Engagement**	
TT4.1	Principles of community involvement	Knowledge
TT4.2	Undertaking community involvement	Experience
TT4.3	Principles of stakeholder engagement	Knowledge
TT4.4	Undertaking stakeholder engagement	Experience
TT4.5	Principles of public consultation	Knowledge
TT4.6	Undertaking public consultation	Experience
M1	**Personal and Inter-Personal Management**	
M1.1	Interpersonal relations	Experience
M1.2	Managing time and activities	Experience
M1.3	Meetings	Experience
M1.4	Personal professional development	Experience
M2	**Leading and Managing Teams**	
M2.1	Team leadership	Experience
M2.2	Team management	Experience
M2.3	Professional development guidance principles	Knowledge
M2.4	Providing professional development guidance	Experience
M3	**Planning and Managing Projects**	
M3.1	Project management principles	Knowledge
M3.2	Developing project work plans	Experience
M3.3	Managing projects	Experience
M4	**Project Procurement** *Unit M5 is an alternative*	
M4.1	Project procurement principles	Knowledge
M4.2	Procuring projects	Experience
M4.3	Negotiating project agreements	Experience

No	Title	Required Competence Level
M5	**Project Proposals** *Unit M4 is an alternative*	
M5.1	Project proposal principles	Knowledge
M5.2	Bidding for projects	Experience
M5.3	Negotiating project agreements	Experience
CCE1	**Communication**	
CCE1.1	Reporting	Proficiency
CCE1.2	Presentation and discussion	Proficiency
CCE2	**Commitment**	
CCE2.1	Compliance with formal requirements	Proficiency
CCE2.2	Compliance with work plans	Proficiency
CCE2.3	Compliance with employer's standards	Proficiency
CCE2.4	Keeping up to date	Proficiency
CCE3	**Ethics and Values**	
CCE3.1	Working in an ethical manner	Proficiency
CCE3.2	Values and behaviour	Experience

The Optional Units and Objectives

No	Title	Required Competence Level - depending on option choices
PD1	**Strategic and Master Plans for Transport**	
PD1.1	Transport plan development principles	Knowledge
PD1.2	Preparation of transport plans	Experience or Proficiency

No	Title	Required Competence Level - depending on option choices
PD2	**Transport Scheme Design**	
PD2.1	Transport scheme design principles	Knowledge
PD2.2	Planning and designing transport schemes	Experience or Proficiency
PD2.3	Planning and designing for integrated transport	Experience or Proficiency
PD2.4	Planning and designing for accessible and secure transport	Experience or Proficiency
PD2.5	The delivery of transport schemes	Experience or Proficiency

No	Title	Required Competence Level
O1	**Travel Planning**	
O1.1	Travel planning principles	Knowledge
O1.2	Travel planning programmes	Experience or Proficiency
O1.3	Travel marketing and information campaigns	Experience or Proficiency
O2	**Commercial and Operational Management**	
O2.1	Commercial and operational management principles	Knowledge
O2.2	Commercial and operational management of schemes and services	Experience or Proficiency

C   The PDS Completion Requirements

C1   The PDS Completion Requirements

C1.1   Understanding the PDS completion requirements takes careful study, but once mastered is not as complex as might initially seem.

The Mandatory Units

C1.2   First, to complete the PDS, the trainee must have satisfied the requirements for every Objective in each of the Mandatory Units. These are:

.   **The Technical Units**
- Policies, PR1.
- Regulations, PR2.
- Data, TT1.
- Transport Modelling and Analysis, TT2.
- Transport Assessment, TT3.
- Public Engagement, TT4.

The Generic Skill Units
- Personal and Inter-Personal Management, M1.
- Leading and Managing Teams, M2.
- Planning and Managing Projects, M3.
- Procuring Projects *Alternative to M5*, M4.
- Project Proposals *Alternative to M4,* M5.
- Communication, CCE1.
- Commitment, CCE2.
- Ethics and Values, CCE3.

C1.3   To complete the Mandatory requirements they need to demonstrate Proficiency in:
- Data, TT1.
- Communication, CCE1.
- Commitment, CCE2.
- Ethics and Values, CCE3.

and Experience in each of the other Units.

The Additional Proficiency Requirements

C1.4   Next, In addition to completing the Mandatory Unit requirements, the trainee needs to demonstrate Proficiency in three of the Technical Units. As Proficiency is Mandatory for Data (TT1), they have nine Units from which they have to choose the three:
- Policies, PR1.
- Regulations, PR2.
- Transport Modelling and Analysis, TT2.
- Transport Assessment, TT3.
- Public Engagement, TT4.
- Strategic and Master Plans for Transport, PD1.
- Transport Scheme Design, PD2.
- Travel Planning, O1.
- Commercial and Operational Management, O2.

Further Additional Requirements

C1.5   Trainees also need to demonstrate Experience in one of the four Optional Units:
- Strategic and Master Plans for Transport, PD1.
- Transport Scheme Design, PD2.
- Travel Planning, O1.
- Commercial and Operational Management, O2.

This requirement is satisfied if they have chosen any of these Units as one of their three additional Proficiency Units – since Proficiency includes Experience.

C1.6   Finally, they have to complete all the Knowledge Objectives for two of the four Optional Units:
- Strategic and Master Plans for Transport, PD1.
- Transport Scheme Design, PD2.
- Travel Planning, O1.
- Commercial and Operational Management, O2.

However, this requirement is satisfied for:
- each of the Optional Units they have completed at Proficiency,

or
- for the one Unit they have completed at Experience,

since Proficiency and Experience required completion of the Knowledge Objectives.

C1.7   The requirement to have completed these Knowledge Objectives matches the TPP Portfolio of Technical Knowledge (PTK) requirement, from which trainees completing the PDS are exempt.

The Possible Additional Completion Possibilities

C1.8   Table C1 illustrates the four possible combinations for the Units and Knowledge Objectives trainees can choose between, in addition to the Mandatory requirements.

Table C1   The PDS Completion Alternatives
in addition to all the Mandatory requirements.

	Completion Possibility 1	Completion Possibility 2	Completion Possibility 3	Completion Possibility 4
From the five Policies and Regulations (PR), and Tools and Techniques (TT) Units – excluding Data (TT1)	3 Ps	2 Ps	1 P	0 Ps
From the four Planning and Design (PD) and Operations (O) Units	1 E 1 K	1 P 1 K	2 Ps	3 Ps

K = all the Knowledge Objectives of a Unit   E = Experience   P = Proficiency

C2   Choosing Suitable Units

C2.1   The trainee's choice of the additional Units they need to complete will depend on:
- their particular interests within transport planning,
- their particular strengths and weaknesses,

and
- the opportunities available to them to gain experience.

C2.2   However strong their interest you, their mentor, need to guide each trainee towards those Units:
- which you consider they are capable of completing at the chosen level – Experience or Proficiency (or Knowledge).
- for which the opportunity exists, or is likely to exist, within your organisation for them to gain the required learning or doing.

n considering possibilities, you need to work with colleagues to find suitable opportunities, which may be by working with teams from other offices or by secondment to partnering organisations.

C2.3   Thus, your role as mentor is to work with others within your organisation to enable your trainees to obtain the range of experience they need as quickly as reasonably possible.

C2.4   As a general principle, the Society advises against a trainee's line manager being their mentor, due to the conflicts of interest this can create, given that:
- the trainee needs to gain the necessary breadth of experience, moving from project to project,

while
- the line manager needs to keep a team that understands their projects, helping to completing them on time and within budget.

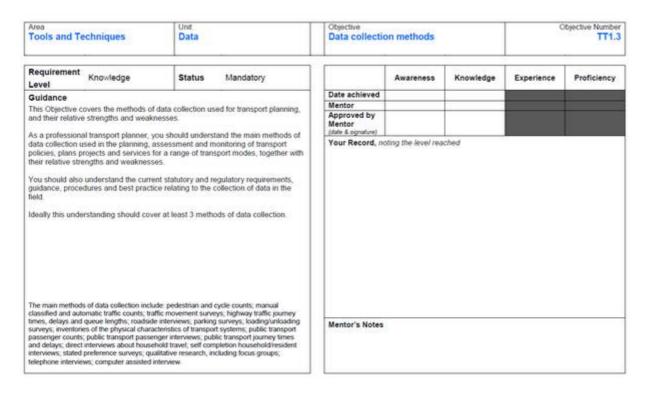# D   The Objective Record Sheet and Recording Progress

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D1   The Objective Record Sheet

D1.1   The Objective Record Sheet is central to the PDS. It is the document which:
- the trainee uses to record what they have learned and what they have done, and
- you, their mentor, use to assess their progress and sign off Objectives the trainee has completed.

D1.2   There is one Objective Record Sheet for each Objective,
- some require completion at Knowledge (or for some, Awareness and Knowledge),

and
- others require completion at either Experience or Proficiency.

An example is given in figure D1.

D1.3   The top row of boxes indicates
- the Area (such as Policies and Regulations),
- the Unit (such as Policies),
- the Objective (such as, National, regional and local policies)
- the Objective Number (such as PR1.1).

D1.4   The required level is given in the left hand box of the second row of the Sheet. The next box indicates whether the Unit is Mandatory or Optional.

Figure D1   An Objective Record Sheet

D1.5   The large left hand box provides guidance on what a trainee should know (or be aware of) or be able to do.

D1.6   The top block of the large right hand box contains space for you to record when the trainee has satisfied the requirements, your name, date and your signature when the Objective is signed off. This area is divided into four columns, one for each of:
- Awareness,
- Knowledge,
- Experience,

and
- Proficiency.

The boxes that represent the level required for completion of the Objective are not shaded, while.
- light shading indicates that the level is optional for this Objective; this is only used for those Objectives for which Proficiency is an option.
- dark shading indicates that the level is not relevant for this Objective.

D1.7   The middle block of the large right hand box contains space for the trainee to record what they have learned or done, when and where. This is described in detail in Sections D4 and D5. If a trainee needs additional space, they should use the continuation template provided at the end of the main PDS document, When evidence is continued on an extension page it is important to ensure it is consistent with the level (A and K, K, E or E and P) requirement of the initial page.

D1.8   The lower block of the large right hand box contains space for you, their mentor, to record comments on the trainee's record.

D2   The Key Principles

D2.1   Para 8.2.1 of Version 3 of the TPS Professional Development Scheme for Transport Planners explains that:

> *progress to completion of the PDS depends on good record keeping throughout, with records updated regularly, while what has been learned or done is fresh in the mind.*

D2.2   The trainee's record is about what the trainee did, or learned. It is not about what the organisation or team did; it is only about 'me'. However, if a Unit is being completed at Proficiency, the use of 'we' in the context of what the group for which the trainee was responsible did can be relevant.

D2.3   The trainee's record must be structured so that you, their mentor, as well as their PDS Reviewer can readily comprehend what the trainee has done to satisfy the Performance Guidance requirements.

D2.4   Each item of learning or doing included in an Objective Record should include a description of
- what they learned or did,
  - including the project title for doing items

and a brief statement on
- where they learned or did the item recorded.
- when they learned or did the item being recorded.

D2.5   Objective Records should be cumulative, built up quarter by quarter
  - or even more frequently.
  - never less frequently.

They should not be completed retrospectively over a period longer than a quarter, on completion of a project for example.

D2.6   In recording either learning outcomes or work experience, trainees must pay close attention to the Performance Guidance, ensuring what they record is relevant to the requirements for the Objective.

D2.7   There must be evidence that you, their mentor, have met with each of your trainees and reviewed their progress at least once a quarter.

D2.8   While there is no limit on the length of an individual Objective record, the trainee should be succinct in capturing the key content.

D2.9   Experience (or learning) can often cover more than one Objective,
- you need to help your trainees think broadly about all the Objectives that might be relevant to a particular experience or learning, but which were not the primary focus of that work/learning opportunity.

Trainees Moving Employers

D2.10 A PDS participant who moves from one licensed employer to another can take their partially completed PDS record with them, and continue with the new employer.

Quarterly Reports

D2.11 As described in Section D3, for those organisations operating a rigorous system of Quarterly Reports, the primary record of progress can be a Quarterly Report. However, the PDS Objective Record Sheets still require completion, albeit with a reference to the relevant Quarterly Report.

Supplementary Documents

D2.12 The PDS Objective Record Sheet can be complemented by other documents. These might be documents prepared for a project or more detailed records of particular pieces of training or work undertaken. If a supplementary document is used:
- the relevant information should be clearly identified,
    - o   the PDS Reviewer cannot be expected to read the whole document to identify the material of relevance to a particular Objective),

thus, there must be precise reference to the particular section of text.

D2.13 If supplementary documents are used, they should be kept with the trainee's Objective Record Sheets, and be readily available to both the trainee's mentor and their PDS Reviewer.

Recognising Past Achievements

D2.14 As many trainees start the PDS with some relevant knowledge and/or experience, mentors should ensure that it is recognised in their PDS record. This might include
- learning outcomes from degrees,
    - o   if they have a transport Masters, they will have the knowledge that satisfies many of the Knowledge Objective,
    - or
    - o   they might have a degree that included relevant modules – such as economics, GIS or data analysis.
- learning or experience from a dissertation or PhD.
- learning and experience from an internship and work experience.
- learning and experience from previous employment.

D2.15 Even if previous learning or experience is not in transport planning, some of it might well contribute to some Objectives, including the Management and Communication, Commitment and Ethics Units.

D2.16 To help trainees make good use of past learning and work, they should be encouraged to read the Performance Guidance for each Objective. Even if they have little relevant learning or experience, reading the Guidance is a good starting point for any new trainee.

D3   The Use of Quarterly Reports

D3.1   Para 8.2.2 Para 8.2.1 of Version 3 of the TPS Professional Development Scheme for Transport Planners explains that:

> *for those in organisations that require the completion of Quarterly Reports, a cross-reference to the relevant Quarterly Report on the Objective Record Sheet can suffice, provided that adequate detail is included in the Quarterly Report and the Reports are readily available to their mentor, and to anyone needing to assess their progress, such as the organisation's PDS Manager or a Transport Planning Society Reviewer.*

D3.2   Quarterly Reports are only acceptable for the PDS if they:
- are rigorously maintained.
- record what the trainee did, or learned – not what the team or organisation did. They must be about 'me' not 'we'.
- are succinct in capturing the key content.
- are reviewed by the trainee's PDS mentor with the trainee at each quarter and, if necessary, revised.

D3.3   Each reference covered by a Quarterly Report should relate to:
- each of the PDS Objectives covered by the experience or learning.

and include
- information on **what** 'I' did or learned.
- **where** 'I' undertook the project or learning opportunity.
- **when** 'I' gained the experience or learning.

D3.4   For Objectives being taken to Proficiency, reference must be made to the level of that work i.e. E(xperience) or P(roficiency).

D3.5   The associated PDS Objective Record Sheet must provide a clear reference to the relevant Quarterly Report, including the appropriate paragraph and the identity of the learning opportunity or the project title.

D3.6   It is good practice for each Quarterly Report to include:
- a (short) reflective overview.
- a plan for future progress through the PDS.
- a record of the trainee's CPD.

D3.7   New trainees in organisations using Quarterly Reports should complete a 'baseline report', covering all relevant previous learning and experience previously obtained, which should be also recognised in their PDS record. Those trainees who have already prepared a number of Quarterly Reports, but have not included all previous learning and experience, should agree with their mentor how best to record it.

D3.8   As noted in the previous Section, to be sure that they have made good use of past learning and work, trainees should first read the Performance Guidance for each Objective.

D4   Recording Progress – Awareness and Knowledge Objectives

D4.1   The Awareness and Knowledge Objectives are about learning; they are not about doing, except to the extent that the doing provided the context for the learning when it's acquired on the job.

D4.2   The requirements for recording how the required Awareness and Knowledge were obtained are essentially the same for those using Quarterly Reports as for those recording directly to PDS Objective Record Sheets.

D4.3   Those using Quarterly Reports must make it clear for each learning item whether it was 'A' or 'K'.

D4.4   For the PDS there is an important difference between Awareness and Knowledge:
- Awareness is having a general understanding about a subject.
- Knowledge is a having sufficient understanding that the trainee can make a useful contribution to a project for which it is required. It includes knowing where and how to find the information required to undertake a piece of work.

D4.5   Records for Awareness and Knowledge and Knowledge Objectives are about
- what the trainee learned.
- how that learning was obtained. That might be:
    o a short course.
    o a conference.
    o part of a university degree module.
    o reading.
    o involvement in a project.
    or
    o another learning opportunity, which should be described.

D4.6   The record should include
- a brief statement about what was learned.
- the title of the course, conference, degree module etc.
  or
- the name of the project together with a brief description of the content that was relevant to the particular Objective.
- when the learning was obtained, ie the month and year.

D4.6   It is important not to confuse experience with learning, unless the description of 'learning' requires reference to experience on a project.
- Records for Awareness and Knowledge and Knowledge Objectives are about 'what I learned', not 'what I did'.

D4.7   Examples are given on the next page of satisfactory and unsatisfactory Knowledge Records.

An Example of a Satisfactory Knowledge Record
Objective TT1.1 - The principal sources of transport statistics and data

These knowledge requirements were covered in my transport Masters 'Transport Data Analysis' in 2011. (Ref: supporting document MSc curriculum modules, Ruralshire University)

Working on an LSTF project for Ruralshire, I obtained data from the County Council's traffic count data bank, bus and rail passenger data from the operators and car parking data from two district councils. From this work I learned about the extraction and use of existing data sources, February – April 2012.

I obtained and reviewed the DfT Transport Statistics 2011 document as background to the Ruralshire LSTF project, which made me aware of the information available through DfT. This gave me extra understanding of the extraction and use of existing data sources). March 2012.

My work assembling and analysing data for the Ruralshire LSTF project continued data from two district councils. May – July 2012

This Record would be satisfactory as
- adequate detail is provided on the individual opportunities cited, as well as the survey types involved and the dates.
- the recording of dates for activities indicates that the record may well have been completed at least once a quarter.

An Example of an Unsatisfactory Knowledge Record
Objective TT1.1 - The principal sources of transport statistics and data

I worked on a travel survey for Grandton NHS Trust, July - September 2010.

I used existing data sources for an assessment of the impacts of a large mixed development scheme in Littleburg, May to July 2011.

My work on data for the Littleburg project continued August to October 2011, and included an involvement in a traffic counting programme.

My work on the Littleburg project was completed in November 2011

I was involved in the design and execution of a bus passenger survey for a planned BRT project in Grandton, April to May 2012

Through all this work I learned about the practical problems of accessing and using third party data sets and in the design and execution of surveys.

This Record would be unsatisfactory as
- it is about what the trainee did, not about what they learned. The use of a final 'catch-all' statement is not sufficient.
- the mentor has failed to stress, maybe even appreciate, the need for their trainee to record their learning outcomes.

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D5   Recording Progress – Experience and Proficiency Objectives

D5.1   The Experience and Proficiency Objectives are about doing as the underlying knowledge is covered by complementary Objectives. The Awareness and Knowledge columns of the Objective Record Sheet are therefore blacked out.

D5.2   The record for an Experience or Proficiency Objective should explain how the work undertaken demonstrates progress to achievement of the objective, and include
- the project title and client (if relevant).
- a brief but very clear description of the trainee's role and responsibilities, and how they relate to the specific Objective.
- when the work was undertaken, ie the month and year.
- an estimate of the trainee's time input.

And, possibly, reflection on what went particularly well and what they might do differently next time.

D5.3   For those Units being taken to Proficiency, whether to satisfy the Mandatory or the additional requirement, the record should make clear which items are being recorded at Experience and which at Proficiency, remembering that
- Experience is about working under supervision.
- Proficiency is about supervising others, or working without supervision.

D5.4   As noted in Section D2, Objective Records should be cumulative, built up at least quarter by quarter; they should never be completed retrospectively on completion of a project.

D5.5   Examples are given below and on the next page of satisfactory and unsatisfactory Experience Records. In both cases, they are examples of just a part of an Objective Record, which would normally include more evidence across different projects.

An Example of a Satisfactory Experience Record
Objective TT2.5 - Preparing transport forecasts

I started work on preparing traffic forecasts for the assessment of a major 10km A7118 road improvement scheme in Grandshire, for which we were to use the County's CUBE model by reviewing the model, March – April 2012.

I obtained and collated additional demographic and economic data from WebTAG and the relevant local planning authorities for use with Grandshire's CUBE model, April – May 2012.

I extended the CUBE highway network to include the proposed scheme, and working with the company's modelling manager helped validate the revised model, May 2012-June 2012.

Working with the company's modelling manager I prepared traffic forecasts for the A7118 scheme June-July 2012.

This Record would be satisfactory as:
- it provides evidence of a range of work in the preparation of forecasts, covering highways and public transport, sub-regional and local.
- the 'when' and 'where' are clearly stated as is the trainee's role.
- the structure indicates that the trainee has updated their record at least once a quarter.

An Example of an Unsatisfactory Experience Record
Objective TT2.5 - Preparing transport forecasts

Traffic forecasts for A7118 improvement scheme, Grandshire, using the County's CUBE model 2011.

Public transport assessment for Greatcity centre improvement plan using Vissim, 2012-13.

Traffic analyses using Transyt for access plans for mixed development scheme for Middletown, 2013

This Record would be considered unsatisfactory as
- it fails to provide any information on the trainee's individual role on the projects listed.
- the description of the work undertaken is too brief to be meaningful to the mentor or PDS Reviewer.
- it reports complete pieces of work, making it clear that the trainee has not been updating their record as work progresses, strongly suggesting that the mentor has not been assessing progress quarterly.

D5.6   Examples are given below and on the next page of satisfactory and unsatisfactory Proficiency Records. These, too, are examples of just a part of an Objective Record, which would normally include more evidence across different projects. In particular, they would include records of work at Experience level.

An Example of a Satisfactory Proficiency Record
PD2.2 - Planning and designing transport schemes

In February 2011, I was appointed Project Manager for a junction improvement scheme along a 20 km length of the A7118 in Grandshire, primarily to improve road safety. I first reviewed the project objectives, programme and budget and, working with our CUBE specialist, I assessed the County's CUBE model to determine the work involved in its use for the study. I then worked with one of our Technical Directors to assemble the team I needed. With the team identified, work commenced in March 2011 (P).

Continuing with the A7118 project, working with my team we assembled and checked the additional data we required. We also started work on adapting the County's CUBE model for the project, and completed forecasts for initial design concepts provided by the engineering design consultants April – June 2011 (P).

With evidence of sufficient Experience, this Record would be satisfactory as:
- it provides an adequate record of the trainee's work.
- it includes descriptions of what the trainee did themselves and what was done through the project team they were managing.
- the structure provides evidence of regular updating.

An Example of an Unsatisfactory Proficiency Record
PD2.2 - Planning and designing transport schemes

In 2011 and 2012 I was Project Manager for the traffic and economic assessment of a junction improvement scheme for the A7118 in Grandshire.

My team was responsible for adapting the County's CUBE model and using it to test alternative design options and for presenting the preferred option in a public consultation run by the County.

We reported on the assessment of the preferred option.

Even if the full record also provides evidence of Experience, this Record would be unsatisfactory as
- although the core of their responsibilities is covered, it lacks the detail that should be provided, including a better description of what the trainee did and what their team did
- it does not indicate whether the items were at E or P level.
- it has not been completed every quarter - retrospective completion does not conform with the Society's requirements.
- both the structure and the limited information indicate a hands-off approach by the mentor

D5.7   If Quarterly Reports are being used, the PDS Objective Record Sheet must include:
- a clear reference to the relevant Quarterly Report, including the appropriate paragraph and the identity of the learning opportunity or the project title,

It must be easy for both the trainee's mentor and their PDS Reviewer to identify the relevant Quarterly Report and the entries in it, PDS Objective by Objective.

D6 Maintaining an Objective by Objective overview

D6.1 Trainees should maintain an Objective by Objective overview of their progress through the PDS. The main PDS document includes, in Section 2, a table (see Figure D6.1) that can be used to do this. a part of which is included below. However, some licensees will have their own format for their trainees to use.

D6.2 The key requirement is that there is such a table and that it is kept up to date.

Figure D6.1 Typical Progress Overview Table

Objective		Required Level	Mandatory Requirement		Optional Requirement	
No	**Title**		Date Commenced	Date Completed	Date Commenced	Date Completed
PR1 Policies						
PR1.1	National, regional and local policies	K				
PR1.2	Transport in the wider world	K				
PR1.3	Transport governance	K				
PR1.4	Planning procedures	K				
PR1.5	Finance for transport	K				
PR1.6	Planning transport projects in line with policies	E (or P as an option)				
PR1.7	Financing transport schemes	E (or P as an option)				
PR1.8	Monitoring the performance of transport projects in a policy context	E (or P as an option)				
PR2 Regulations						
PR2.1	Equality and disability requirements	K				
PR2.2	Health and safety requirements	K				
PR2.3	Transport requirements	K				
PR2.4	Environmental impact requirements	K				
PR2.5	Development planning requirements	A and K				
PR2.6	Applying equality and disability requirements	E (or P as an option)				
PR2.7	Applying health and safety requirements	E (or P as an option)				
PR2.8	Applying transport requirements	E (or P as an option)				
PR2.9	Applying environmental impact requirements	E (or P as an option)				
PR2.10	Applying development planning requirements	E (or P as an option)				

D7 Maintaining Records following Completion

D7.1   For those trainees planning to progress from PDS completion to award of the TPP, their Objective Record Sheets provide a valuable source of information for completion of their TPP Portfolio of Evidence. Indeed, TPP candidates find recalling past work is one of the greatest challenges they face in preparing their submissions – and barrier to completing them.

D7.2   The value of the PDS Objective Records as a source is greatly enhanced if trainees continue to record experience, and whether it is at Experience or Proficiency level, after they have completed an Objective, and the Scheme.

E   Assessing Progress

E1   The Performance Guidance

E1.1   The Performance Guidance provided for each Objective in the left hand box of the Objective Record Sheet is intended as "guidance". Although the Guidance for many Objectives includes a set of topics, the lists are indicative rather than prescriptive. Competence in areas of a similar nature to those listed can also be acceptable.

E1.2   Mentors are expected to use judgement, recognising that while trainees are required to have obtained both breadth and depth of competence before completing the Scheme, there are limits to what can be expected at an early stage of a career.

The Range Requirement

E1.3   The Guidance for some Objectives requires the trainee to have knowledge or to have worked work across a 'range'. For example, the Guidance for Experience/Proficiency Objective TT3.3 - Using Assessment Techniques - requires the trainee to:

have experience in assessing transport policies, plans or schemes. That experience should cover a range of assessment types including economic (cost-benefit) analyses.

The Guidance also includes an explanatory note:

Assessment types include: economic (cost benefit); equity; safety; security; financial; accessibility; severance; environmental; climate change; sustainability; transport and traffic operations and land use.

However, other than the requirement that the Experience (or Proficiency) must include economic assessment, the expectation is that you, the mentor, will use your judgement in assessing a trainee's depth and breadth of knowledge or experience in other elements of assessment, such as environmental, sustainability or financial.

E1.4   The 'breadth' implied in the 'range' requirement is central to completing the PDS. In particular, trainees must have a breadth of knowledge and experience across:

- modes.
- assessment contexts.
- spatial contexts.

E.1.5   A trainee who has only worked on local traffic schemes, or travel planning/smarter travel, would not be able to complete the PDS – nor would they be successful in a TPP application.

Country Specific Knowledge and Experience

E1.6   The Knowledge, Experience and Proficiency requirements relate to the country in which the trainee normally works. Much of the trainee's Knowledge and Experience relating to policies, regulations and best practice should be for the UK nation (or the Republic of Ireland) in which they work.

- For example, a trainee who normally works in England would be expected to know about and have used WebTAG, while one normally working in Scotland would be expected to know about and have used STAG.

E1.7   In addition to the core UK (or Irish) based Knowledge and Experience, relevant experience gained working elsewhere in the world can be recognised.

The Mentor's Appreciation of the Performance Guidance

E1.8   As a mentor, you need to have a thorough appreciation of the Performance Guidance. In particular, you must review it carefully for each Objective you assess, to be sure that your assessment conforms with the Guidance.

E2 Assessing Awareness and Knowledge

E2.1 As explained in Section D4, the Awareness and Knowledge and Knowledge Objectives are about what the trainee has learned, and how they obtained that learning. They are not about work the trainee has done, other than to provide a context for on the job learning.

E2.2 Section D4 also contains a description of the evidence of learning the trainee is expected to provide on the Objective Record Sheets, or in a Quarterly Report.

E2.3 One of your key tasks as their mentor is to assess the trainee's records to determine whether you are satisfied that they have the Knowledge, and Awareness for those Objectives that specify an Awareness requirement, described in the Performance Guidance, interpreted using your judgment.

E2.4 Objectives are assessed for completion one by one.
- That assessment is usually when the trainee tells you they have completed an Objective.
- But, as some trainees are cautious, you, their mentor, might need to advise them when you think they have completed an Objective.

E2.5 If a trainee has recorded attendance on a short course or completion of a university module as evidence they should also provide a description of the course or module content.
- If their learning was assessed by the university, or other provider, and they have passed, you can take can accept that as adequate evidence.
- If the course was not assessed, you will need to test their learning through a discussion, which does not need to be documented.

E2.6 If a trainee has recorded other routes for obtaining the required learning, such a reading, attending a conference or involvement in a project, you will need to satisfy yourself that they have the required learning through a discussion - which does not need to be documented. If the learning was obtained through involvement in a project, it can be helpful to have a discussion with their project manager or team/task leader.

E2.7 However they may have obtained the learning, it is the mentor's responsibility to be satisfied that the trainee really does have the necessary Awareness and/or Knowledge.

E3   Assessing Experience

E3.1   Experience is defined as requiring 'a consistent ability to carry out standard work competently when under supervision'.

E3.2   The words 'consistent ability' are at the core of assessing whether an Objective has been completed. A single project, unless extensive, will not be sufficient to satisfy the 'consistent ability' and 'range' requirements.

E3.3   For many Objectives, there is also a need to satisfy a 'range' requirement. Thus, the work required to satisfy the requirements of an Objective should cover a variety of contexts and should progressively extend and challenge the trainee's abilities.

E3.4   In assessing Experience, you, as the trainees' mentor, should be able to satisfy yourself that:
- you would trust the trainee to complete a similar task again with limited supervision.
- you would be prepared to give them a more complex task/project.
- if the next task is slightly different from an earlier one, you would only need to provide them with limited guidance.
- the trainee can explain the work they are doing.

and
- the trainee can suggest how the work might be done differently the next time.

B3.5   Deciding when a trainee has satisfied an Objective at Experience level cannot be precisely defined. It requires you, their mentor, to exercise considered judgement. That judgement will develop as your experience of working with a number of trainees increases. It is also helpful to liaise with other mentors and your PDS manager.

E4 Assessing Proficiency

E4.1 Proficiency is defined as requiring 'a consistent ability to carry out work competently without supervision, and to supervise others'.

E4.2 For many Objectives, there is also a need to satisfy a 'range' requirement.

E4.3 Thus, as with Experience, the words 'consistent ability' are at the core of assessing whether an Objective has been completed - a single project, unless extensive, will not be sufficient to satisfy the 'consistent ability' and 'range' requirements.

E4.4 However, as explained in Section E5, there are some important differences between Experience and Proficiency in the interpretation of the range requirement for some Units.

E4.5 In assessing Proficiency, you, the mentor, should not only be satisfied that:
- you would trust the trainee to complete a similar task again with limited supervision.
- you would be prepared to give them a more complex task/project.
- if the next task is slightly different from an earlier one, you would only need to provide them with limited guidance.
- the trainee can explain the work they are doing.
- the trainee can suggest how the work might be done differently the next time.

You also need to be satisfied that the trainee has demonstrated their ability to:
- make sound technical and project management judgments.
- see their way through problems, deal with unexpected issues and handle new situations.
- supervise others.
- comment and advise on appropriate procedures.
- deliver work assigned to them to the required standard, on time and within budget.

E5   Units Covering a Variety of Contexts, Topics or Techniques

E5.1   Some Units cover a variety of contexts, topics or techniques at Experience/Proficiency:
- PR1, Policies, has Objectives covering three topics.
- PR2, Regulations, has Objectives covering five topics.
- TT2, Transport Modelling and Analysis, has Objectives covering three topics as well as different contexts.
- TT3, Transport Assessment, has Objectives covering two topics.
- TT4, Public Engagement, has Objectives covering three techniques:
- PD2, Transport Scheme Design, has Objectives covering four topics.

and
- O1, Travel Planning, has Objectives covering two techniques.

A context is the setting for a piece of work, for example, the spatial context might be local, regional, national or international.

A topic is the focus of an Objective, such as Health and Safety or Community Involvement.

A technique refers to the method, such as a multimodal model or environmental assessment.

E5.2   As explained in Section B1, some Units also over a 'range' of contexts or techniques

E5.3   In completing any of these Units at Experience level, the trainee must
- complete each of the Experience Objectives at Experience.
- demonstrate they have *consistently* satisfied the requirements for each Experience Objective.

E5.4   Thus, for Experience, completion of:
- **TT2, Transport Modelling and Analysis,** requires Experience in at least;
  o two modes or in one mode and a multi-modal context.

and
  o two spatial contexts, in the range from local, through area, to national and international.

- **TT3, Transport Assessment,** requires Experience in assessing (TT3.3) and monitoring (TT3.5) a range of impacts, with;
  o economic (cost benefit) being mandatory;

and
  o other assessments including equity; safety; security; financial; accessibility; severance; environmental; climate change; sustainability; transport and traffic operations and land use being acceptable.

It is important to note that completion of TT3 requires the trainee to demonstrate that they have Experience in applying their selected techniques, rather than in just interpreting the results of analyses prepared by others. It is also relevant to note that, although the term 'assessment' has come to have a very particular meaning through its use by DfT, it is used in the PDS in the broader context of 'appraisal' or 'evaluation'.

E5.5   For the Mandatory Proficiency Unit of Data, TT1. Proficiency is required across a number of data collection methods and data types.

E5.6   For those trainees opting for PR1. Policies, PR2, Regulations, TT2, Transport Modelling and Analysis or TT3, Transport Assessment at Proficiency, the requirements are as follows:

- PR1 Policies and PR2, Regulations, Proficiency is required in each of the Experience/Proficiency Objectives. To help distinguish between Experience and Proficiency, the following examples might help;
    - the trainee might have identified, for themselves, the need for reference to a policy or regulation.
    - the trainee might have *consistently* directed or guided others through the appropriate use of a policy or regulation.
    - the trainee might have been responsible for the drafting of a new policy or regulation.

- TT2, Transport Modelling and Analysis, requires Proficiency in:
    - a single mode/spatial context, provided that the trainee has *consistently* demonstrated Experience in at least;
        - two modes or in one mode and in a multi-modal context, and
        - two spatial contexts, in the range from local, through area, national to international.

- TT3, Transport Assessment, requires Proficiency in the application across the range of their selected techniques. The selected range:
    - must include economic impacts, as well as:
    - other assessment techniques, such as equity; safety; security; financial; accessibility; severance; environmental; climate change; sustainability; transport and traffic operations and land use.
    While the trainee might also include interpreting the results of analyses prepared by others, the Proficiency requirement would not be satisfied if it only related to the interpretation of results of analyses prepared by others.

F   CPD

F1   Developing and Maintaining CPD

F1.1   There is no formal requirement for PDS trainees to undertake CPD or to maintain a CPD record. However, as CPD helps them extend their knowledge of transport planning and develop as professionals, they are expected to:
- seek opportunities to undertake CPD.
and
- maintain a CPD record.

F1.2   For those trainees planning to progress to the TPP qualification, participating in CPD and keeping a record will prepare them for the TPP requirement to demonstrate at least 25 hours of CPD in each of the two years prior to submission of their Portfolio of Evidence. Maintaining 25 hours of CPD a year is also a requirement of those awarded the TPP.

F1.3   The Society defines CPD as:
the systematic maintenance, improvement and broadening of knowledge and skills, and the development of personal qualities, necessary for the proper execution of a transport planner's professional responsibilities throughout their working life.

F1.4   Possible CPD activities include:
- attendance on courses leading to a relevant qualification.
- distance learning packages.
- research undertaken in preparation for or as part of a project.
- attendance at professional meetings.
- structured (not routine) reading on particular themes or topics.
- presenting topics that are relevant to their Personal Development Plan (or its equivalent) objectives.
- secondment to a post which adds relevant knowledge and expertise.
- giving presentations to colleagues.
- giving careers presentations to educational establishments.
- shadowing a colleague.
and
- taking an active part in the Society's, or another professional body's, affairs.

F1.5   Although many employers maintain central CPD records, they often only include formal training sessions and exclude many of the forms of CPD recognised by the Society. Unless the central records are complete, the Society recommends that PDS trainees maintain their own records. A possible format, given in Appendix 3 of the main PDS document, is reproduced on the next page in Figure F1.1.

Figure F1.1 A Possible CPD Record Format

Name	Employer	TPS Membership Grade	TPS Membership Number
Year	Period Starting	Period Ending	Sheet no

Date	CPD Activity (What/Where)	How was this training activity identified? E.g. PDP, specific to current job	Data Location	Hours	Cumulative total for year

G   The PDS Review Process

G1   The Key Principles

G1.1   The Society introduced the PDS Review Process in 2014, to seek to ensure consistency in the:

- quality of record keeping, mentoring and assessment within licensees.

and

- use of the PDS across licensees.

G1.2   The process is based on

- the findings from a number of pilot reviews, which revealed considerable differences in the use the PDS within licensees, with some very good and some inadequate examples.

and

- the procedures used by the ICE for monitoring its Graduate under Agreement Scheme.

G1.3   With the introduction of the Review Process the Society:

- is able to award those completing the Scheme a Certificate of PDS Completion.

and

- can have reasonable confidence that those trainees completing the Scheme have the knowledge required to support their exemption from the TPP Portfolio of Technical Knowledge.

G1.4   To seek to ensure that you, a PDS mentor, have the understanding of the Scheme necessary to be effective in their role, you are required to:

- have attended one of the Society's PDS mentor training sessions.

and

- keep up to date thereafter, attending one of the Society's PDS Refresh training sessions every two years.

G1.5   With the Review Process, the Society also introduced a requirement that all PDS trainees must be members of TPS, helping to meet the costs the Society incurs in providing the PDS, including the Reviews.

G1.6   The Reviews are undertaken by a group of trained PDS Reviewers, with each Reviewer undertaking most of the Reviews within a Region so trainees and mentors are seen by the same person over the course of their time on the PDS or working as a mentor. The regions are:

- London, the south of England, Northern Ireland and the Republic of Ireland.
- the English Midlands and Wales.
- the English North West and Yorkshire + Humberside.
- the English North East and Scotland.

G1.7   A Reviewer meets with each trainee at least twice:

- once after 18-24 months.

and

- on completion.

But, they will meet more often if problems are found, or reported.

G2   The First Review

G2.1   The Reviews are arranged by the relevant Reviewer in liaison with either the licensee's PDS manager or a local representative. They are held in the licensee's offices where the trainees are normally based. Sometimes, a licensee can be requested to arrange for a trainee and their mentor from another office to attend.

G2.2   A Review visit usually involves meeting with up to three trainees, and their mentors,

G2.3   The Society's intention is that each trainee is seen by a Reviewer before they have completed 24 months on the Scheme.

G2.4   It is the mentor's responsibility to ensure their trainees are fully prepared for planned Reviews, with a complete and up to date set of Records and with those Objectives for which the requirements have been fully satisfied signed off.

G2.5   A Review is typically structured thus, depending on the number ready for review:
* meeting with the PDS manager (if available), and the mentors and trainees being reviewed (20 minutes),
    o to explain the Review Process.
* meeting with the PDS manager (if available) and the mentors (30 minutes,,
    o to discuss the trainees progress, and any points the mentors consider the Reviewer should be aware of.
* meeting with trainee 1 (60 minutes).
* Reviewer's lunch break, and reflection on morning (30 minutes).
* meeting with trainee 2 (60 minutes).
* meeting with trainee 3 (60 minutes).
* Reviewer prepares findings (30 minutes).
* Reviewer reports back to PDS manager (if available) and mentors and discusses their findings (30 minutes).

G2.6   When meeting with the trainee, the Reviewer assesses:
* their progress.
* the quality and completeness of their record keeping.
* whether the trainee has fully satisfied the requirements for (a sample) of the Objectives their mentor has signed off.
* the support and advice they are receiving from their mentor.
* their key needs to progress to Scheme completion.

G2.7   As noted, the Reviewer then reports their findings to the mentors involved in the visit, together, and discusses progress, any issues of concern and opportunities for improvement.

G2.8   Following the visit, the Reviewer prepares and submits a visit report to the PDS manager.

G2.9   If the Reviewer has any concerns about a trainee's progress or/and the effectiveness of a mentor they will:
- explain their concerns at the end of the visit.
- suggest ways in which they might be overcome.
- suggest a time within which those concerns should be addressed.
- arrange a follow-up visit.

and
- record those concerns and suggestions in their report to the PDS manager.

G3   The Final Review

G3.1   The Final Review takes place when the Society's PDS Review Manager has been told by the licensee's PDS manager has been assured by the trainee and their mentor that the trainee is ready for their Final Review.

G3.2   It is the mentor's responsibility to ensure their trainees are fully prepared for their Final Review, with a complete set of signed off Records and a concise presentation.

G3,3   The PDS Review Manager will send the trainee a Final Review application form, and when it has been completed and returned will arrange for the Review and request that the trainee's:
- PDS Objective records (digital copies, and paper copies if requested)

and
- CV and CPD records

are sent to the Reviewer at least one month before agreed Review date. The Reviewer can also request supporting evidence, including Quarterly Reports and report extracts.

G3.4   The Reviewer assesses the Records and should they identify a major omission or short-coming in the evidence which cannot be readily rectified, they might cancel the planned Final Review. If that is considered necessary, they will give the reasons and guidance for the remedial action to be taken before re-submission.

G3.5   The typical programme for a Final Review is:
- if there is more than one Reviewer, the Reviewers meet and agree the format and any specific concerns to be investigated.
- the trainee and their mentor are invited to join the Reviewer(s).
- the Reviewers explain the process, and encourage the trainee to introduce their self, briefly summarising:
  - their background.
  - their experience to date.
  - when they started PDS.
- the trainee presents a project,
  - the chosen project should demonstrate several Units of Experience and Proficiency.
- the Reviewer(s) discuss the project presentation with the trainee.
- the Reviewer(s) then question the trainee, and their mentor, about
  - their completed Units.
  - their plans for their future development.
  If there are two Reviewers, they will have agreed who leads on particular Units.
- the Reviewer(s) then:
  - respond(s) to questions from the trainee, and their mentor
  and
  - explain(s) the next steps
- the trainee and their mentor then leave the Reviewer(s) to assess the Review and formulate a decision and feedback to be given to trainee and their mentor
- finally, the Reviewer(s) meet with trainee and their mentor and explain their decision.

Excluding the initial meeting of Reviewers, the whole Review takes between two and three hours.

G3.6   In coming to a decision as to whether PDS has been satisfactorily completed, Reviewers will be mindful that, as completion provides exemption from the TPP Portfolio of Technical Knowledge (PTK), the trainee needs to demonstrate a sound breadth and depth of learning, in addition to demonstrating competency in undertaking projects.

G3.7   If the trainee is successful, they will later be presented with a Certificate of PDS Completion issued by TPS, illustrated below in Figure G3.1.

Figure G3.1   Certificate of PDS Completion

G3.8   If the Reviewer(s) concludes(s) that the trainee has not fully satisfied the: requirements for PDS completion, they will:

- advise the trainee, their mentor and their PDS manager of the areas requiring additional learning or/and experience, providing guidance on how the outstanding needs might be addressed.

and

- explain that, depending on the nature and scale of the additional learning or/and experience required, whether
  - o   a written resubmission may be sufficient.
  or
  - o   a further Final Review might be required.

G3.9   If a further Final Review meeting is required, it will focus on those Units/Objectives for which further learning or/and experience is required; a new project presentation will not normally be required.

H   Progress from the PDS to the TPP and other Professional Qualifications

H1 Possible Routes to Professional Qualification

H1.1   One of a PDS mentor's responsibilities is to help their trainees identify the route to professional qualification that best suits their interests, degrees and opportunities.

H1.2   Although the TPP will the target for many there are other possibilities, of which none are mutually exclusive. The others include:
- CEng.
- Chartered Membership of CILT, CMILT.
- Membership of RTPI, MRTPI.

H1.3   If a trainee has a degree that is accredited by the Joint Board of Moderators, as most MEngs awarded by a UK university are, then they may well want to consider award of CEng as their target. Award of CEng might be also be the ambition of those with an engineering degree from a university outside UK, as well as those with a degree that requires them to first complete what is described as Further Learning.

H1.4   CEng is awarded by bodies licensed by the Engineering Council. For PDS trainees there are three relevant awarding bodies:
- CIHT.
- ICE.
- IHE.

Further information on the award of CEng by each of them is on their websites.

H1.5   Completion of the PDS will provide CEng candidates with much of the work experience they will need, but, depending on the awarding body, additional experience might be necessary, particularly in contracts and contract types, engineering principles and health and safety in a civil engineering context. Potential CEng candidates together with you, their mentor, should seek further information from one or more of the awarding institutions.

H1.6   Completion of the PDS satisfies the experience requirements for Chartered membership of CILT for those with degree accredited by CILT. Those with other degrees might need to satisfy other requirements, and potential candidates should seek further information from one or more of the awarding institutions.

H1.7   Membership of RTPI requires candidates to have an accredited degree at either first or postgraduate degree level. Those PDS trainees with an accredited planning degree should seek advice from RTPI on the other requirements they will need to satisfy before being eligible to apply for full membership,

H2   The PDS and the TPP

H2.1   Valuable though other professional qualifications are, it is only the TPP that identifies someone as a professional transport planner.

H2.2   The TPP is awarded jointly by the Society and CIHT. It is managed by a Professional Standards Committee, with CIHT providing administrative support.

H2.3   Both the TPP and PDS are based on the Occupational Standards (NOS) for Transport Planners, and have similar structures and the same levels of competence. However, while progress through the PDS involves the trainee completing learning and experience as opportunities arise, Objective by Objective, the TPP separates knowledge and experience, with candidates first having to demonstrate they have satisfied the knowledge requirements. They are then able progress to demonstrating they have satisfied the experience requirements and have the competence to work as a professionally qualified transport planner, which they do through:
- a TPP Portfolio of Evidence.
- a TPP Professional Review Interview.

H2.4   For those with a UK Honours degree, or its equivalent, the TPP knowledge requirements can be satisfied by:
- completing the PDS.
- having a TPP accredited transport Masters.
or
- completing a Portfolio of Technical Knowledge (PTK).

H2.5   Thus, completion of the PDS represents a key step towards the award of the TPP. It also provides the trainee with much of the required experience. However, while completion of PDS only requires Experience for the Management, M, Units, award of the TPP requires Proficiency in the equivalent TPP Units.

H2.6   There is another key difference between the two. The structure of the PDS is such that the competence in each Objective is assessed individually, while a crucial test for a professional transport planner is an ability to demonstrate that they can bring these individual skills together in undertaking their work. For example, that they can:
- relate their modelling capability to the assessment needs of a particular policy.
or
- determine the data needs and availability for the preparation of a smart travel plan.

H2.7   TPP candidates also need to demonstrate that they:
- can link their management and technical skills.
and
- have the skill to communicate well with all those they work with and encounter during their work.

H2.8   Although much of this 'wider view' is likely to have been obtained during their work as a PDS trainee, most of those completing the PDS will need another year or two to obtain sufficient experience to bring the individual PDS Experience and Proficiency strands together to be able to demonstrate, through their TPP Portfolio of Evidence

and Professional Review Interview, that they really do have this 'wider view' and wisdom when applying their competencies.

H2.9   Although the TPP is based on the same ten 'Technical' units as the PDS, with the same distinction between those that are Mandatory ('Core' in TPP terms) and Optional ('Additional' in TPP terms), there are some differences in the Unit titles as shown in Table H2.1.

Table H2.1   Comparable Technical Unit Titles for the PDS and the TPP

TPS Professional Development Scheme Technical Units		TPP Qualification Technical (Section A) Units	
PR1	Policies	A1	The policy context
PR2	Regulations	A2	Laws and regulations
TT1	Data	A3	Data
TT2	Transport modelling and analysis	A4	Transport models and forecasting
TT3	Transport assessment	A5	Assessment
TT4	Public engagement	A6	Stakeholder engagement
PD1	Strategic and master plans for transport	A7	Developing strategic and master plans for transport
PD2	Transport scheme design	A8	Applying the principles of transport systems design
O1	Travel planning	A9	Travel planning
O2	Commercial and operational management	A10	The commercial and operational management of transport systems

H2.10 While the PDS and TPP Technical Units map directly on to each other, the structure of the PDS generic (CCE and M) Units is different to that of the TPP Management (Section B) Units. This is because the PDS Units are derived directly from the NOS for Transport Planning, while those for the TPP are derived from the requirements for the Chartered Engineer (CEng).

H2.11 The TPP Units are:
- B1 Professional leadership.
- B2 Interpersonal skills.
- B3 Commitment and professional conduct.

H2.12 Further advice for the mentors of PDS trainees who are planning to apply for the TPP is provided in the TPS document 'Preparing and Applying for the TPP Qualification - Some Advice for Those on the TPS Professional Development Scheme', available to all registered PDS mentors through their PDS manager, and in the PDS Mentor area of the TPS website (See Part K).

I   The PDS Trainee

I1   The Trainee

I1.1   The PDS is open to any transport planner working for an organisation that has a PDS licence, wherever they are based and whether or not they have a university degree, provided:
- they are committed to developing their career as a transport planner,

and
- their employer can provide effective PDS mentoring support and opportunities to satisfy the full range of PDS knowledge and experience requirements.

I1.2   The PDS is unlikely to be suitable for a school leaver.

I1.3   However, only those trainees normally based in the UK are covered by the PDS Review Process, and are eligible for award of the Certificate of PDS Completion. Those normally working in the Republic of Ireland can be included in the Review Process, provided arrangements have been agreed between the Society's PDS Review Manager and their employer.

I1.4   Only those trainees completing the PDS who have a UK Honours degree, or its equivalent, are exempt the TPP Portfolio of Technical Knowledge. Those without a UK Honours degree, or its equivalent, will have to complete a TPP Technical Report before being able to proceed to their TPP Portfolio of Evidence and TPP Professional Review Interview. The TPP secretariat, education@ciht.org.uk, has access to the NARIC system which provides the UK equivalence of non UK degrees.

I1.5   Although primarily designed for new entrants to transport planning, usually as graduates, the PDS can also be used by:
- those with a few years experience,

or
- career changers,

who want to develop their career in a structured manner, particularly if they plan to progress to the TPP and are seeking a structured pathway to obtaining the experience (and/or learning) they need.

I1.6   At whatever point in their career they join the PDS, trainees must be committed to:
- obtaining the breadth of learning and experience required for PDS completion,
    - the PDS is not suited to those wishing to specialise in a particular area of transport planning, such a modelling or travel planning,
- taking responsibility for managing projects (or tasks) and others,
- keeping good records, quarter by quarter (or more frequently) of their progress through the PDS, Objective by Objective,

and
- working with you, their mentor,

to develop their career as a professional transport planner.

J   The PDS Mentor

J1   The Key PDS Mentor Responsibilities

J1.1   As set out in Section A1, you need to be committed and able to work with each of your trainees, helping them progress through the PDS, working with others to ensure that they have the necessary opportunities to obtain the learning and experience required for PDS completion.

J1.2   Also, as explained in Section A1, you should meet with each trainee at least once a quarter to review their progress records and sign off completed Objectives where the trainee can demonstrate that they have fully satisfied the Scheme requirements. This will ensure that the trainee maintains a set of completed records for planned visits by a PDS Reviewer. Although it is the responsibility of the trainee to set up regular meetings with you, their mentor, you should prompt and encourage the trainee to schedule them well in advance to fit around your work.

J1.3   You are both the assessor and a friend for each of your trainees, with a key role to play in their development as a professional transport planner.

Mentors and Line Managers
J1.4   Ideally, you will not be your trainee's line manager. This is because:
- as a mentor, your responsibility is to help them achieve the breadth of competence required for completion.
- as a line manager, your responsibility is to deliver work on time and within budget. These responsibilities can conflict with the need of your trainees to develop a breadth of experience.

However, if the combination of mentor and line manager is unavoidable – or if there are sound reasons for such a combination – you, and your PDS manager, need to ensure that your trainees are not disadvantaged.

J1.5   Some organisations have found that splitting a trainee's time between different projects, possibly over different teams or even offices, can help provide the necessary breadth of experience while recognising the needs of line managers.

J1.6   Whether you are your trainee's line manager or not, you need to work closely with other line managers to identify opportunities for each of your trainees to obtain the breadth, and depth, of experience they require for completion of the PDS – and progress to the TPP.

Working with Your Trainee(s)
J1.7   You need to have a strong and effective relationship with each of your trainees, working with them to find the best ways, for them, to satisfy the full set of PDS requirements, given:
- the opportunities likely to be available.
- their education and experience to date.
- their interests.
and
- their strengths and weaknesses.

J1.8   Liaising with your PDS manager, you need to have good relations and work well with those responsible within your organisation for training as well as project managers to

help your trainees obtain the knowledge and experience required for completion of the PDS.

J1.9   As membership of TPS an obligatory requirement for all TPS trainees, you must be sure each of your trainees is a member, telling them how to apply if they are not yet members.

Meeting with Your Trainee(s)

J1.10   You must meet, with your trainee at least once every three months – or more frequently if the trainee requests it - giving them the time needed to ensure they are keeping good, up to date, Objective Records and, if used, completing their Quarterly Reports on schedule, complying fully with all the requirements.

J1.11   At each of these meetings you must also:
- assess their progress since you last met, signing off those Objectives they have completed, having first ensured that they have satisfied the requirements described in the Performance Guidance.
- help them plan their next steps towards PDS completion, including maintaining their Professional Development Plan.

J1.12   The meetings with your trainees should be planned in advance and you should both then keep to the agreed time.

Encouraging Your Trainees

J1.13   Your role is to encourage your trainees to:
- work towards completion of the PDS and on to the professional qualification of their choice,
  - helping them overcome any uncertainties about their progress or doubts about continuing to follow the PDS.
  - maintaining a commitment to complete the Scheme.
- pursue CPD to help satisfy the PDS requirements and to extend their knowledge.
- keep good PDS and CPD records, including an annual CPD statement
- be professionally active.

J1.14   You should support rather than lead them. Each trainee must take ownership of their own professional development.

Secondment

J1.15   Not all organisations employing transport planners undertake work across the range a trainee is required to have. However, by participating in the PDS, the organisation will have recognised the importance of achieving the breadth of competence required for completion of the PDS.

J1.16   Working with others, you, the mentor, need to seek to arrange secondment to an organisation that can provide the necessary experience in those aspects where their own organisation is lacking. For some local authorities, it might be possible to make arrangements with a partnering organisation, or with an organisation to which relevant work has been contracted.

J1.17   Any secondment arrangement needs to be carefully designed, and well documented to protect the proper interests of the trainee, their employer and the receiving

organisation. The secondment paperwork needs to clearly set out the needs of the trainee and how the receiving organisation will satisfy them. You, the mentor should continue to support a trainee throughout their secondment, working with the host organisation to ensure the arrangements meet the professional development needs of the trainee.

Topic Mentors

J1.18   If one of your trainees needs to obtain knowledge or experience that you feel unable to properly assess, you can delegate responsibility for the relevant Objectives to a Topic Mentor. However, you retain overall responsibility and should still sign the trainee's record as meeting the appropriate competence level, working with the Topic Mentor to assess the competency level achieved.

PDS Reviews

J1.19   You should encourage your trainees to make good and timely preparations for their PDS Review, helping them:
- be sure that their PDS documents are complete and up to date,
- select their project for presentation at their Final Review
and
- rehearse their presentation.

Whenever possible, you should be present for the Review, and work with the Reviewer to ensure that the Review provides a fair assessment of their progress, and potential.

Changing Mentors

J1.20   Given the time it is likely to take a trainee to complete the PDS, it may become necessary for a change in mentor during the training period. Both the original mentor and the new mentor should ensure that there is a smooth and effective handover between mentors.

Changing Employers

J1.21   If one of your trainees leaves your organisation before completing the PDS, you should be sure you sign off all those Objectives which have been completed. Provided the new employer is also a PDS licensee, the trainee should be able to continue with the PDS, pursuing completion of the remaining Objectives.

After PDS Completion

J1.22   Once one of your trainees has completed the Scheme, it is very desirable that you continue to work with them as they extend their technical and management experience and work towards award of the professional qualification that best suits them.

You and the TPP

J1.23   Although there is no requirement for mentors to have the TPP, having the TPP not only demonstrates your own commitment to the qualification but your experience in applying for it will help you in giving your trainees good advice.

K   Support for Mentors

K1   Support for PDS Mentors

Mentor Training and Refresh

K1.1   All PDS mentors are required to attend a TPS PDS mentor's training session, and keep up to date thereafter, attending a Refresh training session at least once every two years.

PDS Advice Notes

K1.2   The Society publishes an Advice Note series, to provide PDS managers and mentors with advice on Scheme management.

K1.3   The Advice Notes are an essential part of the PDS, providing information designed to help you be an effective PDS mentor. You should:

- make sure you are familiar with them, reading and heeding them,

and

- use them to help guide your trainees.

K1.4   PDS managers are responsible for distributing them to all their mentors. Ideally, they should also be available through your organisation's intranet or, if it has one, its PDS network, such as Yammer, Chatter or SharePoint. They are also available in the PDS area of the TPS website, described below.

The PDS Web Area

K1.5   The Society provides support to PDS Mentors through its website, at www.tps.org.uk/main/login/section/members

K1.6   This PDS Mentor's area of the Society's website consists of three parts

- a library of all PDS related documents.
- a news area, where the Society posts information of relevance to PDS mentors and PDS managers.

and

- a discussion board, enabling PDS mentors and PDS manages to post comments and questions.

K1.7   Access to the PDS area is limited to registered PDS mentors, PDS managers and PDS reviewers. Registered Mentors are those who have attended a TPS PDS Mentor training session and are up to date having attended a Refresh session.

K1.8   Logging in requires your business e-mail address and your organisation's TPS Stakeholder membership number; if you who have completed one of the Society' training sessions, you will have been provided with the number.

Contacting the Society

K1.9   Your PDS manager should always be your first point of call if you have any questions about the PDS or your role as a PDS mentor. However, should you need to contact the Society, you can do that by e-mail to pds@tps.org.uk.