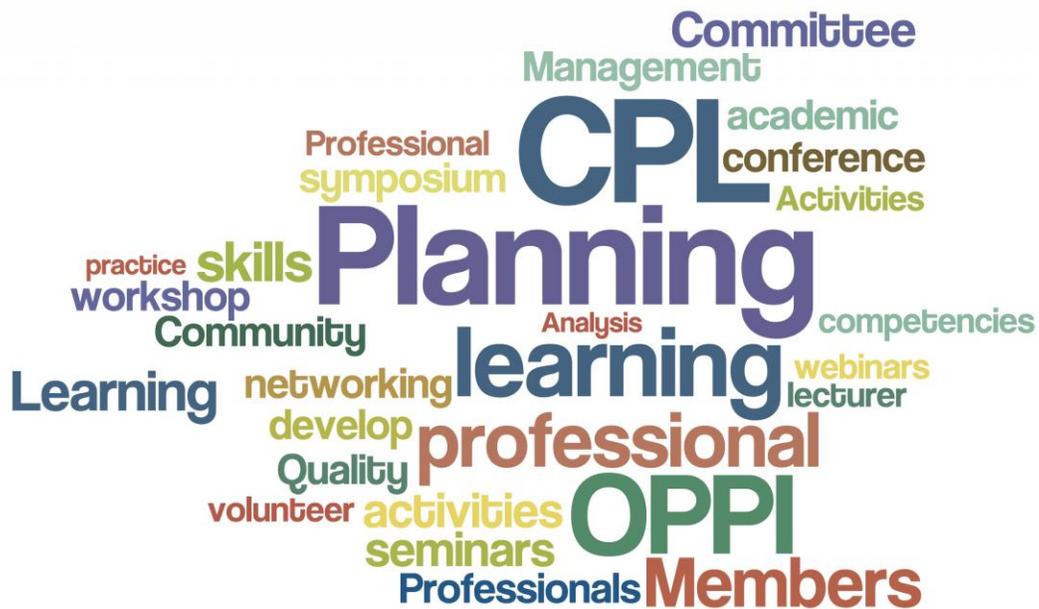


# OPPI Continuous Professional Learning PROGRAM GUIDE



ONTARIO PROFESSIONAL PLANNERS INSTITUTE  
continuous professional learning

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# 1. A Program for Planners

## 1.1 OPPI Continuous Professional Learning Program

The Ontario Professional Planners Institute (OPPI) has instituted mandatory Continuous Professional Learning (CPL) as a requirement of Membership. This responds to the profession's commitment to maintaining competency on a continuous basis, as well as the public's growing need for assurance that many professionals—planners included—remain current with contemporary theory, methods and practice within their profession. To that end, OPPI has developed a CPL Program that fits the unique needs of planning professionals in Ontario, while retaining consistency with a national framework initiated by the Canadian Institute of Planners and the Provincial and Territorial Institutes and Associations (PTIAs). This Guide to OPPI's Continuous Professional Learning Program describes its structure, requirements and reporting procedures, and how it fits into the broader national framework.

## 1.2 CPL National and PTIA Roles and Responsibilities

OPPI Council is the ultimate approval authority for the CPL Program and is responsible for any program changes, including allocation of CPL credits and disciplinary action. OPPI Council has delegated the administration of the CPL Program to its Professional Standards and Registration Committee (PS&RC). OPPI Council is also mandated to offer direction to the PS&RC where special circumstances arise through administration of the CPL Program. OPPI is committed to ensuring that the CPL Program provides value, is realistic and that it meets the needs of Members whether they practice in large urban areas or more remote northern and/or rural areas.

OPPI Council will work with the Canadian Institute of Planners (CIP) and the PTIAs in other provinces to ensure consistency and portability of its CPL Program across PTIAs.

OPPI's PS&RC oversees the administration of the CPL Program, is responsible for drafting and revising the CPL Guide and works in cooperation with other OPPI Committees to identify and provide adequate CPL opportunities for Members. PS&RC oversees program compliance, including an annual random audit of the Membership.

CIP and the PTIAs have developed a framework that serves as a national standard for professional learning. From this framework, PTIAs have created programs for professional learning consistent with the national standard.

### 1.3 OPPI *Professional Code of Practice* and Enabling By-law

OPPI's *Professional Code of Practice* requires Members to attain and maintain a high standard of professional competence. This has not changed. However, this requirement is now enshrined in the OPPI By-law, which requires Members to report their Continuous Professional Learning (CPL) activities.

The OPPI *Professional Code of Practice* states, in part:

#### 3.0 The Planner's Responsibility to the Profession and Other Members

The vitality and credibility of the planning profession and of the Institute are reflective of the quality of the Membership. To further the profession, Members will be expected to attain and maintain a high standard of professional competence and conduct, which extends to their relationship with other Members. Accordingly, Members shall:

- 3.1 Take all reasonable steps to maintain their professional competence throughout their working lives and shall comply with OPPI's continuing professional learning requirements as amended from time to time;...[and]
- 3.3 Maintain an appropriate awareness of contemporary planning philosophy, theory, and practice by seeking and receiving professional education throughout a planning career;
- 3.4 Contribute to the professional education, mentoring and development of planning students, Members and other colleagues; ...

To institute mandatory CPL for OPPI Members, the Membership voted to adopt a program of mandatory CPL (November 30, 2012), and the bylaws of the Institute were amended to include the following clauses:

*2.2.7 Maintenance of membership, among other matters requires that:*

*2.2.7.1 Each Full Member, other than a Retired Member or a Non-Practicing Member, and each Candidate Member shall undertake annual Continuing Professional Learning (CPL) and shall report that CPL to the Institute on an annual basis.*

*2.2.7.2 Council shall establish rules for activities deemed acceptable as CPL and for the reporting and monitoring of those activities by the Registrar.*

*2.2.7.3 If a Full Member or Candidate Member is late in completing or reporting required CPL activities, the Institute may establish and require the imposition of a penalty on the member. Such penalty when in the form of a monetary fine or charge shall be deemed a fee for the purposes of Section 2.2.6.2 of this By-law.*

*2.2.7.4 Prior to revocation of membership for failure to meet required annual CPL activities, a member shall be provided fifteen (15) days written notice, or such further period as the Registrar may allow in the circumstances, to rectify such default.*

## 1.4 Key Program Information

Essential information regarding dates and requirements of the OPPI Continuous Professional Learning Program:

This program, which started on January 1, 2013, applies to all (practicing) Full and Candidate/Provisional Members.

Reporting periods are annual (January 1 to December 31), with each reporting deadline being January 15<sup>th</sup> of the following year.

The required number of Learning Units (LUs) for each reporting period is 18.0 LUs— including a minimum of 9.0 Learning Units of Organized & Structured Activities (as defined elsewhere in this guide).

In recognition that Members' access to organized activities may vary from year to year, Members may carry up to 9.0 excess LUs for Organized & Structured Activities forward for credit in the next subsequent year. Members may not carry any LUs forward for Independent & Self-directed Activities, and may not “bank” or carry forward excess LUs for Organized & Structured Activities for more than one year.

### Clarifications:

**If you obtain excess Organized & Structured LUs in Year 1, but then you are exempt from the CPL requirement in Year 2 (e.g., you're non-practicing), then if you return to practice in Year 3 you cannot carry forward to Year 3 those LUs from Year 1.**

**If you are not required to meet the CPL requirement in Year 1 (e.g., you became a member part-way through the year), even if you do record Organized & Structured LUs, you cannot carry forward any of those as “excess” LUs to Year 2.**

Learning activities do not need to be pre-approved by OPPI in order to count for credit.

Learning activities do not necessarily need to be directly related to traditional land-use planning to count as acceptable CPL activities that can be reported for credit. Provided an activity is reasonably relevant to the day-to-day work of a professional planner, or to professional planning (broadly conceived), that Member can report that activity for CPL credit.

## 2. Professional Learning Activities & Learning Units

### 2.1 Professional Learning Activities

The purpose of the CPL Program is to engage Members in furthering their knowledge, understanding, skills and abilities relevant to the theory, methods and practice of planning. It is expected that Members will actively engage in all manner of professional learning

activities and be able to contemplate and reflect upon the new knowledge, skills or abilities gained from each activity.

The CPL Program is intended to accommodate Members' diverse professional interests and provide flexibility and access to a range of professional development opportunities. To achieve this, the program has been designed with two broad categories of learning activity:

**a) Organized & Structured Activities**

Organized & Structured Activities include structured courses, presentations, seminars, workshops and guided tours that are provided by OPPI, an OPPI District, other PTIAs, by CIP, or by an external provider or group. These would also include different forms of structured, distance education activities, as well as in-house workshops or relevant courses or "lunch'n'learn" sessions offered at workplaces. The fact that an employer pays for or provides the activity or allows it to be done on paid time does not disqualify it as CPL. OPPI encourages employers and workplaces to recognize and promote their employees' CPL needs.

**b) Independent & Self-directed Activities**

Independent & Self-directed activities are deliberate and educational, yield new knowledge for the individual Member and should apply to the practice of planning. They are generally not organized by a provider nor do they have any structured delivery or requirements. Examples are civic or professional committees, teaching, reading and self-designed learning experiences.

Activities that are part of a Member's day-to-day work duties (i.e., working on projects, attending associated public meetings, etc., even if after office hours) cannot be reported for credit. However, some reading or research that is triggered by particular work duties or projects may result in genuine professional learning of much more general applicability, and therefore qualify as legitimate Independent & Self-directed CPL.

Continuous professional learning for Members who work in academic positions must be undertaken and reported in the same manner as for all other professional Members, as outlined in this Guide. Activities that are part of an academic Member's day-to-day work (i.e., regularly scheduled lecturing, teaching regular courses, academic administration, etc.) cannot be reported for credit. However, presentations, conferences, seminars, workshops, volunteer work and other activities that are not part of an academic Member's day-to-day work may be reported for CPL credit.

Unpaid lecturing, studio work and advising in an academic setting, as well as student mentoring, undertaken by Members who are not in academic positions may be reported for credit.

## 2.2 Professional Learning Topic Areas

To qualify for Learning Units, the Professional Learning activity must encompass any topic areas that relate to Members' varied and wide-ranging day-to-day professional planning responsibilities. The following is an alphabetical list of some subjects that qualify as OPPI CPL Program Learning Units:

- Agricultural/Environmental Planning
- Code of Ethics
- Community Learning
- Community Improvement Plan
- Conflict Resolution and Mediation
- Demographics
- Environmental Analysis and issues of land use and learning
- Environmental Assessment
- Government Regulation and Legislation
- Environmental Law
- Environmental Site Assessment, Brownfield
- Heritage Preservation
- Housing
- Infrastructure, Servicing and Phasing
- Land Learning/Management
- Management of Planning Projects
- Mapping – GIS
- Official Community Plans
- Planning Law
- Planning related to Architecture & Landscape Architecture
- Project Management
- Public Input and Analysis
- Regional Planning
- Resource/Environmental Planning & Management
- Rural Planning
- Social Planning
- Site Design and analysis
- Sustainable Learning Practices
- Tourism & Recreation Management/Planning
- Transportation Planning
- Urban Design / Place Making
- Urban Planning
- Zoning
- Various workplace skills training/learning (e.g. communication, public speaking, leadership, change management, succession planning, specialized technology or software)
- Other relevant topic areas.

Eligible types of planning-related activities could include:

<b>Organized and Structured Activities</b>	<b>Independent &amp; Self-directed Activities</b>
Organized or guided walking tours or mobile workshops	Self-guided educational walking tours, site visits, or educational field study
Attendance at formal courses or organized workshops/ seminars/lectures/ sessions, presentations and similar activities	Critical readings/reviews of relevant articles, books or other publications
Attendance at OPPI/CIP/APA & other non-OPPI relevant professional conference sessions or OPPI Chapter Events	Participation on professional, civic, or community advisory boards and committees (outside regular work duties)
Preparation/Presentation of material for lectures/workshops/seminars, conference sessions (volunteer work)	Self-directed research (e.g., web, literature, interviews)
Organized Distance Education Programs & activities (tele-learning, correspondence, web based, etc.)	Volunteering for the Professional Standards Board as a Mentor, Sponsor, PLAR reviewer, or Exam marker
Organized film presentations/ documentaries	Volunteering on OPPI Council and/or CIP committees, task forces, exam panels etc.
Organized presentations/activities of professional community outreach (i.e., to schools, community groups, etc.)	Critical review of professional learning materials/tools (videos, multimedia, online self-learning etc.)
Researching and writing professional articles or books for review/publication	

This list is not exhaustive, and Members are encouraged to use their imaginations and creativity in finding relevant CPL opportunities, and to be professional and reasonable in claiming credit for them.

### 2.3 Learning Units

Continuous Professional Learning credits are recorded as Learning Units (LUs). They are calculated in two ways:

#### **Calculated:**

One Learning Unit is normally equivalent to the time spent undertaking the learning activity—where one LU equals one full hour (60 minutes) of appropriate and acceptable professional learning activity. Reporting must be to the nearest quarter hour and acceptable activities must be at least ½ hour in duration (equivalent to 0.5 LUs). For example, a 3½ hour session of learning activity earns you 3.5 LUs.

#### **Assigned:**

For many Independent & Self-directed Activities (and some Organized & Structured Activities) where direct allocation of LUs by time is difficult or not appropriate, approximate equivalent Learning Unit values are assigned – please see the next section for details.

### 2.4 Assigned Learning Units

CIP and the PTIAs have agreed that calculating Learning Units by the allocated time would not be appropriate or accurate for a number of learning activities. Particular activities, listed in Table A below, have been assigned learning unit values that have been adopted by OPPI and all other PTIAs. This list may be updated annually or as necessary. If undertaking a learning activity where it is not appropriate to calculate by time, but it is not assigned a learning value in Table A, please make your best judgment on the value when reporting.

Table A: Assigned Learning Units

<b>Organized &amp; Structured Activities (LUs)</b>	
Attending a Guided Tour, Field Study or Mobile Workshop:	
Full Day	4.0
Half Day	2.0
Less than one Half Day	1.0
Leading a Guided Tour, Field Study or Mobile Workshop:	
Full Day	5.0
Half Day	3.0
Less than one Half Day	2.0
Preparation of material for an organized lecture, workshop, seminar, presentation or conference session.	4.0
Researching & writing a professional or academic article for review and organized publication (depends on length/complexity).	3.0 – 6.0
Researching & writing a professional or academic book/text for review and organized publication (depends on length/complexity).	6.0 – 12.0
<b>Independent &amp; Self-directed Activities (LUs)</b>	
Participation on relevant boards, committees, task forces, or other professional, civic/community volunteerism (outside regular work duties) for one year: <b>NOTE: THESE ARE LEARNING UNITS PER YEAR PER COMMITTEE</b>	
more than 20 hours of meetings/work per year	5.0
between 5 and 20 hours of meetings/work per year	3.5
less than 5 hours of meetings/work per year	2.0
Critical reading/review of an academic or professional book/text.	3.0
Critical reading/review of a journal, academic or professional article.	1.0
Volunteering as a Mentor/Advisor (per contact hour with candidate mentor or student).	1.0
Undertaking a Self-Directed Tour, Field Study, etc,:	
Full Day	4.0
Half Day	2.0
Less than one Half Day	1.0

### 3. Reporting CPL Activities

#### 3.1 CPL Reporting Requirements

All Full and Candidate/Provisional Members are required to earn and report a minimum of 18 Learning Units (LUs) annually, within the calendar year (January 1 to December 31) in which they were earned, recognized as the reporting year. Of the minimum number of LUs required, all 18 can be of the Organized & Structured variety. However, only half the required LUs, or a maximum of 9, may be reported as Independent & Self-directed in any reporting period. In summary:

- 9 LUs Organized & Structured Activities (minimum)
- 9 LUs Independent & Self-Directed Activities (maximum)
- 18 LUs Annual Requirement (minimum total)

Should Members report LUs in excess of the required 18, they may carry forward a maximum of 9 excess Organized & Structured LUs to the following reporting year. Members may not carry over any Independent & Self-directed LUs and may not “bank” or carry forward excess Organized & Structured LUs for more than one year.

#### 3.2 Online Reporting

**OPPI encourages you to plan your CPL activities ahead of time. The OPPI Learning Path tool is a visual guide available on the website and can also be printed out. It can help you develop learning goals to maintain the core competencies of the planning profession and obtain and strengthen the knowledge and skills you need to advance professionally through your career.**

Members report their Professional Learning activities online. The online reporting format will allow Members to enter LUs as Organized & Structured or as Independent & Self-directed Activities.

Members will report the appropriate information, including the date the activity was undertaken, the title of the activity (i.e., name of session, presentation or course; name of book written or read, etc.), the provider (i.e., OPPI, other organization) if applicable, and the number of LUs calculated or assigned to that activity.

It is recommended that Members report their Learning Units over the course of the reporting year, rather than waiting until the January 15<sup>th</sup> deadline. This will make recalling learning activities easier and will ensure that activities are reported correctly.

Note: It is in your best interest to keep accurate back-up documentation of activities you attend to help ensure there is no discrepancy in the recording process. Additionally, a random audit of Member’s CPL records may be conducted annually by OPPI, and Members may be asked to verify certain LUs.

### 3.3 Compliance and Exemptions

In accordance with the Institute's By-laws, all Full and Candidate/Provisional Members are required to comply with the Continuous Professional Learning and reporting requirements on an annual basis.

Members who become subject to the CPL requirement partway through a year are exempt from the requirements for that year, but must meet the CPL requirement for the next full year. This would apply to members transferring in from another PTIA, or newly joining OPPI as Candidate Members.

Only in certain exceptional circumstances may Members have the requirements waived by the Institute. These include:

Members with certain Membership status or within certain Membership categories, as designated by OPPI Council from time to time, are exempt from the requirements. Currently, these exempt categories include Students, Retired Members, and Non-Practicing Members. **Therefore, members who become non-practicing should advise OPPI in writing (including email) of this change as soon as possible. Similarly, members who would like to request an exemption from the CPL requirement on the basis of temporary non-practice (medical leave, parental leave, switch to a job not involving the practice of planning), or for other extraordinary or compassionate circumstances, should advise OPPI as soon as possible. Straight-forward requests may be granted by the Registrar, but some requests may require more documentation and a decision by the Professional Standards & Registration Committee.**

**Further to the Professional Code of Practice, Members should undertake and record CPL continually while they are practicing. Therefore, members who are practicing part of a year should generally meet a *prorated* or reduced CPL requirement for that year. For instance, a member on parental leave from July to the next June should do approximately half of the CPL requirement for each of those years.**

### 3.4 Reporting Assessment

Members may receive notification of their CPL reporting progress part-way through the year, in the form of a Progress Report. This report would serve as a reminder to Members of their CPL requirements.

Additionally, Members will receive an Annual Status Report after the January 15<sup>th</sup> reporting deadline and after the PS&RC has conducted a reporting assessment. This Status Report serves as confirmation that a Member has or has not fully complied with the CPL requirements for the reporting year, according to OPPI records.

Learning Units should be claimed and reported by Members based on their professional judgment and the contents of this CPL Guide. As a general rule, OPPI will accept those claims in good faith.

Random audits and evaluations may be performed by the PS&RC annually. Members may be asked to provide further information about CPL activities they reported, and/or to justify the Learning Units they claimed for various activities. For this reason, Members should keep accurate records and supporting documentation and information regarding their reported activities.

Should an audit result in Learning Units not being accepted by the PS&RC, the Member will be given a reasonable period of time to fulfil the outstanding CPL requirements.

### **3.5 Non-compliance and Disciplinary Action**

The Institute will work with Members to assist them in meeting the requirements for CPL. **The reporting deadline for each reporting period (year) is the following January 15<sup>th</sup>.** Members who complete the necessary requirements for reporting their CPL for the preceding year after this deadline but before **April 30<sup>th</sup>** will be required to pay a penalty of \$250, as set from time to time by OPPI Council.

Members who do not report their CPL for the preceding year by April 30<sup>th</sup>, or who have reported it between January 15<sup>th</sup> and April 30<sup>th</sup> but have refused to pay the associated penalty, will not be invited or allowed to renew their OPPI membership the next year.

**NOTE: Members who do not meet the CPL requirement for 2015 by January 15<sup>th</sup>, 2016, will be required to pay a penalty of \$250 + HST, AND to record further activities in order to meet the CPL requirement for 2015. If they do not do BOTH of these things by April 30, 2016, they will not be invited or allowed to renew their memberships for 2017.**

**If an individual ends his or her OPPI membership (due to resignation or failure to pay the annual fee), and that member had been assessed (or could have been assessed) a CPL penalty fee, then that individual's subsequent reinstatement as a member is subject to payment of the outstanding CPL penalty fee (as well as whatever "Reinstatement Fee" might be in place at that later time). The PS&RC will decide whether to approve a reinstatement application in this or similar circumstances involving CPL non-compliance.**

Members who disagree with any OPPI staff decision regarding their CPL requirement or activities or the penalty fee may appeal in writing to the PS&RC. The Committee will review and consider the matter and make a final decision.