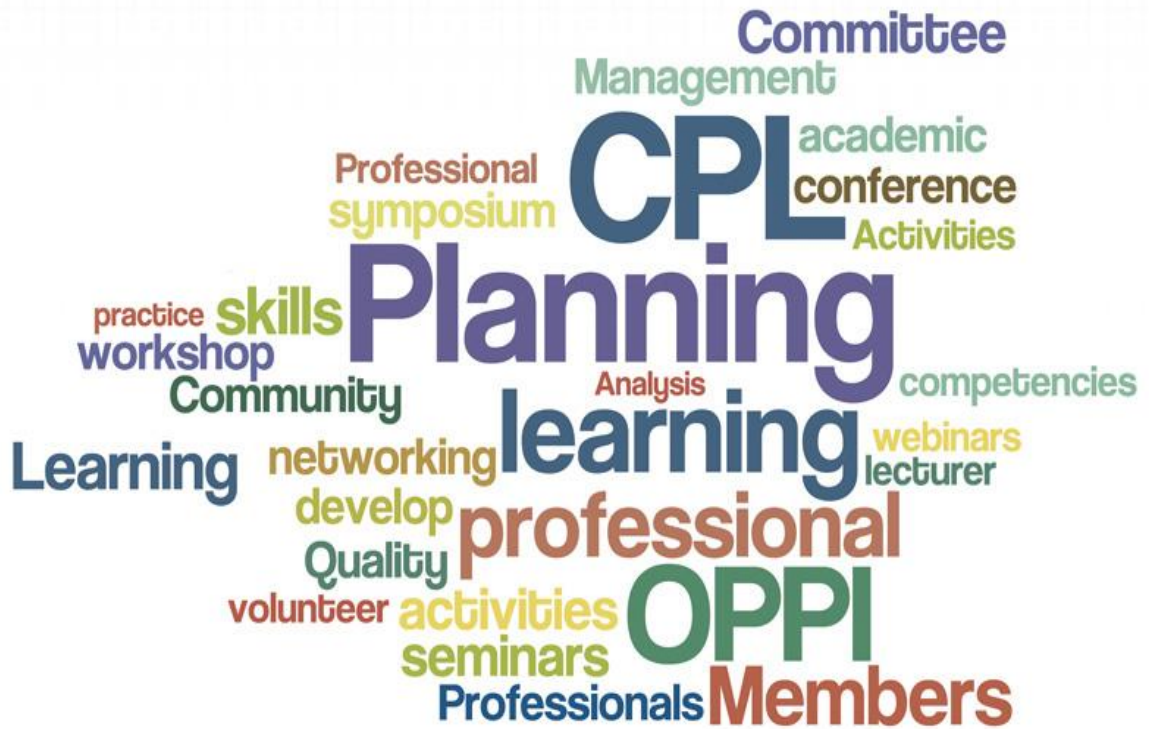


OPPI Continuing Professional Learning PROGRAM GUIDE



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 its affiliates. 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. Responses to frequently asked questions are appended.

1.2 CPL National and Affiliate 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 its affiliates in other provinces to ensure consistency and portability of its CPL Program across affiliates.

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 its affiliates have developed a framework that serves as a national standard for professional learning. From this framework, affiliates 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 March 1st 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.

Learning activities (Organized & Structured Activities or Independent & Self-directed 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, that Member can report that activity for 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 affiliates, Approved November 30, 2012 – Revised March 2015

by CIP, or by an external provider or group. These would also include different forms of structured, distance education activities.

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 associated with Members' day-to-day employment responsibilities as a professional will not be acceptable for credit as valid professional learning activities. However, special in-house workplace professional learning or training activities are acceptable.

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.) may not 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
- Other relevant topic areas.

Eligible types of planning-related activities could include:

Organized and Structured Activities	Independent & Self-directed Activities
Organized or guided walking tours or mobile workshops	Self-guided educational walking tours
Attendance at formal courses	Critical readings/reviews of relevant articles, books or other publications
Attendance at organized workshops/ seminars/lectures/ sessions, presentations and similar activities	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)
Attendance at OPPI/CIP/APA & other relevant professional conference sessions or OPPI Chapter Events	Self-guided tours and site visits or educational field study
Organized Distance Education Programs & activities (tele-learning, correspondence, web based, etc.)	Volunteering on OPPI Council and/or CIP committees, task forces, exam panels etc.
Organized film presentations/documentaries	Volunteering as a mentor
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	

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 its affiliates 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 affiliates. 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

Organized & Structured Activities (LUs)	
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
Independent & Self-directed Activities (LUs)	
Participation on relevant boards, committees, task forces, or other professional, civic/community volunteerism (outside regular work duties) for one year:	
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

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 March 1st 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 will 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. 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.

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 affiliate, or newly joining OPPI as Candidate Members.

Members may claim exemptions from the CPL requirement based on special circumstances. Such requests should be made in writing to the Registrar in advance of the reporting deadline for the applicable reporting period. Special circumstances may include parental or medical leave, or other extraordinary or compassionate circumstances.

These requests will be placed on the Member's file, and may be subject to random audits and review by the PS&RC. Partial exemptions or *pro rating* of the CPL requirement may also be claimed (e.g., a maternity leave running from July to June would justify the Member meeting only ½ of the CPL requirement in 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 March 1st 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 March 1st.**

Members who complete the necessary requirements for reporting their CPL for the preceding year after this deadline but before June 30th 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 June 30th, or who have reported it between March 1st and June 30th 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 March 1, 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 June 30, 2016, they will not be invited or allowed to renew their memberships for 2017.

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.

Appendix 1: Frequently Asked Questions

Q How are Members' Learning Units be verified?

The Members' Learning Unit submissions to the OPPI CPL Program are accepted in good faith, with random audits and evaluations performed by the PS&RC annually. Members must keep accurate records and supporting documentation concerning their reported activities.

Q Can a Member earn Learning Units from professional learning programs in other jurisdictions?

Yes. While there is not yet a nation-wide mandatory CPL program, the OPPI program will typically recognize Learning Units for activities acquired and/or accepted in other recognized jurisdictions provided they are verifiable and meet the standard criteria of any CPL activity.

Q Can you take the same course/activity twice?

Yes, as long as it is not within the same reporting period and it advances your professional learning (i.e., you will gain new knowledge from taking it a second time).

Q Can my normal business, work or practice activities be submitted for Learning Unit requirements?

No. The intent is to acquire/investigate/explore new areas of information in addition to or outside the Members' normal daily business or practice. This requires the Members' individual assessment of their experience, activities and duties. There will always be new material to learn. The profession is constantly advancing and planners must evolve with it.

Q Can special In-house seminars qualify for LUs?

Yes. This applies to either outside consultants or industry representatives brought in by the business, workplace or practice, or information sessions organized from within the workplace or firm's resources.

Q Can distance education activities qualify for the purpose of accumulating LUs?

Yes. Distance education is defined as a method of instruction where there is a separation of place and/or time between the instructor and learner, between fellow learners, and/or the learners and the learning resources. Distance education is a valid educational tool for all Members whether they live in remote locations or in more urban areas. Multiple delivery methods are also possible. This is expected to be an increasingly important and useful method of accumulating Learning Units, especially for Members in all locations throughout Ontario. Examples of distance education program delivery are:

- Audiotape/audio conferencing
- Television programming (e.g., knowledge network)
- CD-ROM/software
- Computer software online training
- Correspondence (written) courses
- Publication/articles
- Teleconference
- Videotapes
- Internet courses
- Webinars

Q What if I am unable to comply with the CPL Program requirements in the time periods given?

The primary objective of the By-law is to encourage all Members' Continuous Professional Learning. The OPPI is committed to assisting Members to be successful in completing their CPL Program requirements, through provision of regular offerings; conferences; symposiums and access to CPL Program information. Minor concerns will be assessed by the PS&RC to determine if the Member requires assistance or is subject to special circumstances affecting her or his ability to complete the annual CPL Program requirement. However, serious non-compliance will be addressed in accordance with the By-laws, and policies outlined in this Guide.

Q Are Provisional or Candidate Members under the same requirements?

Yes, they must comply with and maintain all current requirements starting with their first full year of Membership.

Student Members are exempt from the CPL requirement.

Q How does the CPL Program apply to new Members of OPPI?

Newly admitted Candidate/Provisional Members – must comply with all current CPL requirements starting with their first full year of Membership.

Members who transfer in from another Affiliate – practicing Full Members or Candidate/Provisional Members must comply with all current CPL requirements starting with their first full year of Membership.

Q Can I exceed the annual requirement and carry forward acquired Learning Units?

Yes. Recognizing that Members' access to organized activities may vary from year to year, Members may carry up to 9.0 excess LUs for Organized & Structured Activity forward for credit in the next subsequent reporting period (year). However, Members may not carry any Independent & Self-directed Activity LUs forward, and may not "bank" or carry forward excess LUs for more than one year.

Q What kinds of providers of Organized & Structured Activity are considered valid in terms of CPL?

Any number of organizations, groups and individuals may provide valid learning activities. Various providers of learning activities do not need to be pre-approved or endorsed by OPPI in order for the activities they provide to count as valid CPL.

Q If a Member does not work in a traditional land-use planning area, and all the activities s/he attends are not related to traditional land-use oriented planning, does this mean that the Member will be unable to report his or her activities for CPL credit, and unable to meet the 18.0 LUs required?

No. OPPI recognizes that many Members do not do traditional or land-use planning work, and that, as professional planners, they engage in a wide range of work and therefore undertake a wide variety of learning activities, covering a wide range of topic areas—many of which may be seen as non-traditional. The important thing to remember is that the learning activities should be reasonably relevant to the Members' day-to-day professional work. While every submission is reviewed on a case-by-case basis, Members are encouraged to report all the activities they feel might be relevant and acceptable for CPL credit.

Q Can I get credit for relevant volunteer work that I undertake?

Yes. Volunteer work related to Members' professional planning work, including sitting on an OPPI committee or Council, or other professional or community volunteer work can count and be reported as valid Self-directed Activities. Refer to earlier sections of this Guide for details on how to calculate LUs for volunteer work.

Q How long should I keep the paperwork supporting my CPL PROGRAM records?

You must keep your records for the current year plus the previous year. Any OPPI CPL Program audit will be done no later than the year following any reporting of a Member's CPL activity.

Q How do I decide if an activity qualifies for the CPL Program?

Carefully review the activity in the light of this CPL Guide. Use your professional judgment and common sense, keeping in mind the intention and "spirit" of the CPL requirement. If you are still in doubt, consult your fellow OPPI members. As a last resort, please feel free to contact OPPI's Registrar.

Q Have additional questions & feedback?

OPPI will continually update and revise the CPL program and this Guide to ensure Members' needs are addressed. Your questions, comments and feedback are important to ensuring the program develops in a manner which is most valuable and effective for the Members. Please don't hesitate to contact the Registrar with your questions or comments.