

## OPPI CPL FAQ's

- **What is CPL?**
  - Continuous Professional Learning, or CPL, is a mandatory program for all Candidate and Full (RPP) members of the Ontario Professional Planners Institute (OPPI). This program has been a compulsory element of membership since 2014 and it 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 remain current with contemporary theory, methods and practice within their profession.
  - The CPL program is a national standard and is enforced by all other Provincial and Territorial Institutes and Associations across Canada.
- **Who is required to complete CPL?**
  - Generally, all Candidate and Full members of OPPI are required to complete an annual CPL requirement. Some exceptions may be granted to members in certain circumstances.
- **Why do I have to do CPL?**
  - Members of OPPI are required to participate in the CPL program to demonstrate their professional commitment to maintaining competency on a continuous basis. Members of OPPI are required to define and serve the public interest and demonstrating their evolving competency through their participation in the CPL Program.
  - We encourage all members to consider themselves lifelong learners!
- **What do I have to do?**
  - Each year, members are required to undertake various learning activities and report a minimum of 18 learning units on their [member profile](#). Recognizing that the field of planning is incredibly diverse, members are encouraged to use their independent, professional judgment to determine whether participation in a certain learning activity should count toward their annual requirement. Participation in activities that form part of a member's regular, professional duties as a planner (e.g., participating in public meetings) **cannot** be counted towards their annual requirement.
  - 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.
- **What are learning units?**
  - Learning units represent approximately one hour of learning activity. Members are required to claim a minimum of 18 learning units annually. There are two categories of learning units that members can claim:
    - Organized & Structured. Organized & Structured Activities include structured courses, presentations, seminars, workshops, webinars and guided tours that are provided by OPPI, an OPPI District, other planning institutes, 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, relevant courses, or “lunch & 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.

- **Independent & Self-Directed.** 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.
- 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.
- **What does it mean to “carry forward” learning units?**
  - Once a member has met the requirement of 18 learning units for the year, any additional organized and structured learning units they claim, up to a maximum of nine (9), may be carried forward and claimed in the next CPL cycle. **This only applies to organized and structured learning units.** For example:
    - So far this year, a member has claimed 16 learning units and only requires two more to meet their annual requirement. They enrol in a course that last for six weeks but will finish before the end of the year. Assuming the member claims six organized and structured LUs for each week’s lecture, they will have claimed 22 learning units for the year. Because they have now met the requirement, any LUs above the requirement of 18 are carried over; meaning 4 LUs are carried over into the next CPL year.
    - A member has fulfilled their CPL requirement for the year, but leads a full day guided excursion at the OPPI conference. They claim 5.0 organized & structured learning units for leading the excursion before the reporting period closes. Because they had already completed the requirement, **all 5 LUs** are carried over into the next CPL year.
- **What kind of activities CAN’T be considered under the program?**
  - Activities that are part of a member’s day-to-day work duties cannot be reported for credit. This includes working on projects, attending associated public meetings, etc., even if after office hours. Additionally, activities that are more social in nature, such as networking events, trivia nights, and more should not be considered as learning units. While learning certainly may occur during these events, their main purpose is more about socialization and networking than pure learning. As always, members are encouraged to apply their independent professional judgment to ensure whether participation in any activity should count towards their requirement.

- **How can someone be exempted from the CPL requirement?**
  - *There are a handful of circumstances in which a member may be exempted from the CPL requirement:*
    - *Non-Practicing membership. If a Full or Candidate member is not currently practicing planning for gain for any reason, including parental leave, sick leave, or working in a field outside of planning, they may request to be moved into Non-Practicing membership. While Non-practicing, members are exempt from the CPL requirement for up to five years.*
    - *Alternatively, OPPI appreciates that some personal circumstances may preclude a member from meeting the CPL requirement during the course of their career. It is advisable to contact the [Registrar](#) at your earliest convenience to discuss the possibility of an accommodated or exempted CPL requirement, in consideration of your circumstances. These kinds of requests are reviewed on a case-by-case basis.*
    - *Those individuals who have been accepted into the Retired Member category are also exempt from the CPL requirement.*
- **Do I have to do CPL if I'm currently in the Non-Practicing membership category?**
  - *Non-Practicing Membership should be considered a temporary membership category. Those Candidate and Full members who have requested and subsequently moved into the Non-Practicing membership category are exempt from the CPL requirement for as long as they are Non-Practicing members, **up to five years**. If a member remains a Non-Practicing member for longer than five years, they are required to resume reporting CPL in their sixth and any subsequent years that they remain Non-Practicing.*
- **What happens to my CPL when I return to practice after being in the Non-Practicing membership category?**
  - *Generally, members are assigned a pro-rated requirement to meet, commensurate to the number of months remaining in the year. They are not expected to complete the full 18 learning units unless they return to practice at the beginning of a CPL cycle.*
- **What happens if I don't complete the annual CPL requirement?**
  - *The reporting deadline for the CPL cycle is January 15<sup>th</sup> of the following year. Those members who are in danger of not meeting the requirement are provided with several notices throughout the year, leading up to the deadline.*
  - *If members do not meet the reporting deadline, they are assessed a penalty fee of \$250 + HST. If a member does not pay the penalty fee and log their CPL, they are not invited to renew their membership.*
  - *If an individual is removed from the member register for CPL non-compliance and they wish to return to OPPI membership, they must request in writing to the Professional Standards & Registration Committee (PS&RC) of OPPI to be reinstated as a member and explain the circumstances that led to their non-compliance of the CPL standard. Reinstatement requests are reviewed on a case-by-case basis, and some requests may not be granted.*
- **How does OPPI verify the validity of my CPL claims?**
  - *OPPI's Professional Standards & Registration Committee (PS&RC) conducts a random audit of OPPI members each year and reviews their claims to verify their*

*validity and ensure they comply with the requirements set out in the CPL Program Guide.*

- *Those members who are audited are contacted by the Registrar to advise that they have been audited.*
- *If the PS&RC finds that a member's claims may be questionable, the Registrar will share the Committee's concerns with the member, as well as advice on how to correct their claims in future, but those claims are not invalidated.*
- *Members with findings are re-audited the following year and if findings are made in the second audit, the member will be asked to provide either updated claims for those learning units, or to claim new learning units that align with the requirements of the Program Guide. If the member does not comply with this request, they are placed in the CPL non-compliance track, are assessed a \$250 CPL penalty fee, and will not be invited to renew their membership until the penalty fee is paid and CPL claims amended to the Program Guide's requirements.*
- **Where can I learn more about OPPI's CPL Program?**
  - *To learn more about the program, please consult the [CPL Program Guide](#)*
  - *If you have any further questions, you feel are not answered by the Guide, please contact the [OPPI Registrar](#).*