

## ***How OPPI processes your application***

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### **Avoid processing delays by providing all the required information on the Membership Application Form and submitting the appropriate fee and documents.**

OPPI acknowledges all membership applications. Once your membership has been approved and you have paid your fee, you become a member of both the Ontario Professional Planners Institute (OPPI) and the Canadian Institute of Planners (CIP).

We will process applications for Provisional membership from individuals who hold a degree from a planning school program recognized by OPPI/CIP as soon as the Membership Coordinator has received all of the applicant's documents and appropriate payment.

Other membership applications and documents received at OPPI by the 1st Friday of the month are usually reviewed by the end of the same month.

If you are a foreign-trained professional and a permanent resident in Ontario, you must first apply to have your academic credentials by courses assessed before you apply for membership in OPPI and have the report mailed directly to OPPI. When your academic credentials have been assessed, you may apply to OPPI for Provisional membership. To have your credentials assessed, contact one of the following:

World Education Services  
700 - 45 Charles St E  
Toronto, Ontario  
M4Y 1S2 - Canada  
Tel: 416-972-0070  
or 1-866-343-0070  
Fax: 416-972-9004  
<http://www.wes.org/ca/>

Canadian Information Centre  
for International Credentials  
1106 - 95 St. Clair Ave W  
Toronto, Ontario  
M4V 1N6 - Canada  
Tel: (416) 962-9725  
Fax: (416) 962-2800  
<http://www.cicic.ca/>

Comparative Education Service  
University of Toronto  
315 Bloor St W  
Toronto, Ontario  
M5S 1A3 - Canada  
Tel: (416) 978-2190  
Fax: 416-978-7022  
<http://www.adm.utoronto.ca/ces>

International Credential Assessment Service of Canada  
Ontario AgriCentre  
303 - 100 Stone Rd W  
Guelph, Ontario  
N1G 5L3 - Canada  
Tel: (519) 763-7282  
Fax: (519) 763-6964  
<http://icascanada.ca/contact.php>

If you have a degree in a field other than planning, or a degree from a Country that has no reciprocity agreement with CIP, you must attend an Entrance Interview or Entrance Interview Workshop. OPPI offers these workshops free of charge. After the interview, the OPPI Registrar will assess whether you are eligible to start the process of logging planning work experience (as Provisional members are required to do). The decision is based on your current and past academic and employment record.

## **Section 1. Categories of membership**

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### **1A. PROVISIONAL MEMBER**

A Provisional Member is a person whose address is in Ontario, who holds:

- an undergraduate degree from a recognized planning school program; *or*
- a postgraduate degree from a recognized planning school program; *or*
- a four-year degree related to planning (e.g., some Geography degrees); *or*
- a four-year degree not related to planning (e.g., Geology);

and who has not yet completed the OPPI's requirements for Full membership.

When you apply for Provisional membership for the first time, you must:

- send your payment with your application form;
- have the university(ies) mail your official university transcripts of your marks to the attention of the Membership Coordinator. (Photocopies, fax copies and transcripts issued to students will not be accepted.)

Once all these documents are received, OPPI will process your payment and will start processing your application.

You will have seven years in which to become a Full Member by satisfying OPPI's exam requirements and submitting logs of your work experience for review and validation.

The required amount of planning work experience to be logged depends on your education and the nature of your degree. You may be required to log periods of work experience longer than the minimum periods set out below:

- A. Recognized planning degree: a minimum of two years' experience in planning is required.
- B. Degree in a field related to planning: a minimum of four years' experience in planning is required.
- C. Degree in a field non-related to planning: a minimum of six years' experience in planning is required.

Applicants without the requisite academic award but who have 15 or more years of planning experience may be eligible to apply for Provisional membership through the *Special Admissions* route (see Special Admissions requirements below).

Prior to becoming a Provisional member, you must ask a Full Member of CIP to act as your sponsor. The sponsor will provide advice as you prepare documentation of your relevant planning experience, review your completed records of relevant planning experience according to the Schedule P of the OPPI By-laws, sign your log sign-off sheet, and help you prepare for the Institute's examinations. It is the responsibility of the applicant to find a sponsor.

All Provisional Members who are required to satisfy the Exam B requirement must do so within five years of becoming a Provisional member. You must register for an OPPI membership course once you have logged at least 50% of your minimum logging requirement, pay the course fee, write four essays, and receive a passing mark on those essays to fulfil the requirements of Exam B. The membership course is offered online.

All Provisional Members without exception must pass Exam A to become a Full Member.

If your application for Provisional membership is rejected, you may be offered Public Associate status, in which case you will receive a refund for the Professional Liability Insurance portion of your initial payment.

The membership processing fee for Provisional members is non-refundable.

#### **1B. REINSTATEMENT OF MEMBERSHIP**

If you were previously a Provisional or Full Member of OPPI and have allowed your membership to lapse for any reason, you must apply for reinstatement and pay the reinstatement fee if you wish to rejoin the Institute. If you were previously assigned an OPPI member ID number, put this number on the application form. Note: Individuals who left the Institute before 2002 do not have an OPPI member ID number.

Reinstatement as a Provisional or Full Member requires that you meet the eligibility requirements currently in effect and have your application approved by the Membership Committee. If the reinstatement is denied, the reinstatement fee will not be refunded. Provisional members whose membership is reinstated will have to start logging their relevant planning work experience from the date of their reinstatement only.

#### **1C. PUBLIC ASSOCIATE**

A Public Associate is a person who:

- has an address in Ontario;
- does not hold any other form of membership in OPPI/CIP;
- does not qualify for Full, Provisional, or Student membership in OPPI and does not hold a four-year Honours degree;
- is not working in planning;
- would like to support and promote the objectives of the Institute.

Public Associate members are not required to take OPPI examinations, are not entitled to use the "Registered Professional Planner" (RPP) designation, and are not eligible for professional liability insurance.

### ***Section 2. Member profile***

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Once you become a member of OPPI, you will receive an OPPI member ID and a password that gives you access to the "Members Only" section of OPPI's website. Using the website, you can modify the data in your Member Profile to reflect changes in your career. Keeping your profile up to date helps OPPI send you relevant planning information in a timely manner.

The only change that cannot be made on the website is a change of name. Send this information in writing to the OPPI office. Note that changes made on the OPPI website will automatically occur on the CIP website, but changes made on the CIP website will not be reflected on the OPPI website.

### ***Section 3. Enclosures***

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Make sure you have included your payment and that the appropriate documents are either attached or are being sent by your Institution. Failure to do so will delay the application process. OPPI will process your payment upon receipt.

### ***Section 4. Privacy and security of information***

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OPPI and CIP respect the privacy of Members and the security of personal data. We use the information we collect in documents and on our website only for the purpose of providing service to our members.

OPPI's Privacy and Security Policy is posted on the Members Only area of the OPPI website. You can also obtain a copy by contacting the OPPI office. The policy covers data collection, data security, third-party access to data, and the security of the OPPI website. CIP's Privacy Policy is posted on the CIP website, or can be obtained by contacting the CIP office.

**Section 5. Application fee**

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OPPI’s membership year runs from January 1 to December 31. Therefore, OPPI offers a reduction for fees paid in the second half of the year for all membership categories found below. If you pay your fee between July 1 and September 30, consult the table below for the amount of the deduction. Enter the total amount into the space provided on the application form.

**Note:** If you apply in October, November or December **2011**, please note that your payment will cover your membership fees for **2012**. You will not have to complete membership renewal for **2012**.

Type of membership	Time of application	Regular fee	Deduction	Total
Applying for Public Associate membership	Between Oct 1, 2011 and June 30, 2012	\$491.55		\$491.55
	Between July 1, 2012 and Sept. 30, 2012	\$491.55	\$245.77	\$245.78
OPPI Student member applying for Provisional membership	Between Oct 1, 2011 and June 30, 2012	\$708.51		\$708.51
	Between July 1, 2012 and Sept. 30, 2012	\$708.51	\$317.58	\$390.93
Non-member applying for Provisional membership	Between Oct 1, 2011 and June 30, 2012	\$708.51		\$708.51
	Between July 1, 2012 and Sept. 30, 2012	\$708.51	\$245.78	\$462.73
Provisional member applying for reinstatement	Between Oct 1, 2011 and June 30, 2012	\$991.01		\$991.01
	Between July 1, 2012 and Sept. 30, 2012	\$991.01	\$245.78	\$745.23
Full member applying for reinstatement	Between Oct 1, 2011 and June 30, 2012	\$903.10		\$838.34
	Between July 1, 2012 and Sept. 30, 2012	\$903.10	\$285.44	\$617.66
Applying for Full member (out of province)	Between Oct 1, 2011 and June 30, 2012	\$365.33		\$365.33
	Between July 1, 2012 and Sept. 30, 2012	\$365.33	\$182.66	\$182.67

Your application fee payment will be processed shortly after OPPI has received it.

A confirmation of payment and an official receipt will be available in the member’s area of our website under My Documents once the Membership Committee has approved your application. A Liability Insurance certificate will also be available in the member’s area of our website under My Documents for Provisional and Full Members. Liability Insurance, which is administered by CIP, is mandatory for these members.

An administration fee will be charged for NSF cheques, plus any bank charges.

**Other routes to membership in OPPI**

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**SPECIAL ADMISSIONS ROUTE**

The Canadian Institute of Planners offers a route of entry known as the Special Admissions Clause. OPPI Council has adopted this provision as a route to membership for experienced planning professionals. Membership through the Special Admissions route is available to a planner without the requisite academic award who has:

- 15 or more years of progressively responsible Canadian planning experience; and
- holds a senior position in their organization; and/or
- has made a significant contribution to the planning profession.

If you would like to apply in this category and you are not a Provisional Member, you must apply for Provisional membership.

You are not required to provide copies of your academic credentials, nor are you required to submit a log of your planning experience. Instead, you must submit the most current copy of your complete résumé, along with a two to three-page letter in narrative format (not point form), describing your planning experience.

When OPPI receives these documents (along with the membership application and appropriate fee), the Registrar will review the documents and make a decision regarding your eligibility for membership. If you are eligible and were not previously a member of OPPI, you will then be granted "conditional" Provisional membership in the Institute.

To fulfil the requirements for Full membership, you will have to register for the next Membership Course, pay the additional fee for the course, and successfully complete all course requirements. You will then have to sit the Registration Exam for Full membership (Exam A) shortly after successfully completing the Membership Course. Failure to successfully pass the Membership Course or the Registration Exam will result in OPPI not renewing your "conditional" Provisional membership for the following year.

If you are eligible for this route to membership, download the appropriate forms from OPPI's website and send the completed forms to the OPPI office, along with the appropriate fees.

#### **TRANSFER FROM ANOTHER CANADIAN PLANNING ASSOCIATION**

If you are a member in good standing with another provincial planning association affiliated with CIP who has moved to Ontario and you wish to transfer your membership to OPPI, please send your request directly to the affiliate of which you are currently a member, asking the affiliate to forward your file to OPPI.

Provisional Members transferring to OPPI as a Member in good standing of another affiliate will not be charged the OPPI's annual membership processing fee during the year of transfer.

Provisional and Full Members in good standing who transfer from CIP International to OPPI must pay the professional liability insurance fee at the time of their transfer to activate their membership with OPPI.

Individuals who are not members in good standing of a Canadian planning association (CIP affiliate) must apply for reinstatement with the affiliate before having their file transferred.

**OPPI STAFF CONTACT INFORMATION**

**Membership Coordinator** – [membership@ontarioplanners.on.ca](mailto:membership@ontarioplanners.on.ca)

Phone: 416.483.1873 or 1.800.668.1448 ext. 222

**[www.ontarioplanners.on.ca](http://www.ontarioplanners.on.ca)**

**CIP STAFF CONTACT INFORMATION**

**Administrative Assistant, Members Services** – [cleduc@cip-icu.ca](mailto:cleduc@cip-icu.ca)

Phone: 613.237.7526 or 1.800.207.2138

**[www.cip-icu.ca](http://www.cip-icu.ca)**