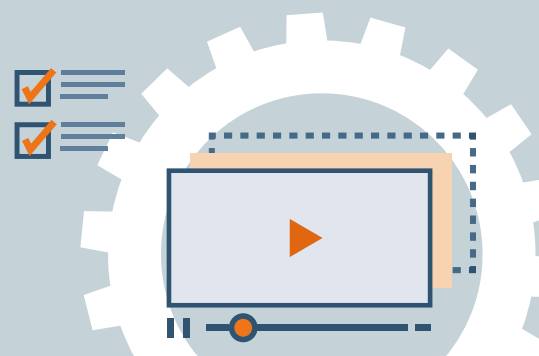


GENERAL ACCREDITATION PROCEDURE FOR CONTINUING EDUCATION ACTIVITIES



2023-2025 CYCLE OF THE MCEP

INTRODUCTION

The Organisme d'autoréglementation du courtage immobilier du Québec (hereinafter the OACIQ or Organization), whose sole mission is to ensure public protection by overseeing the practice of Québec real estate brokers, has a Mandatory Continuing Education Program (hereinafter called the Program) for all licence holders. This Program includes:

- the Policy on continuing education of the OACIQ;
- the General accreditation procedure for continuing education activities;
- a fee schedule; and
- the Individual recognition procedure for continuing education activities.

The purpose of this General accreditation procedure for continuing education activities is to recognize training activities within the Program. A training activity accredited by the OACIQ allows the licence holders who complete it to receive continuing education units (CEUs) recognized under the Program.

1. CONTINUING EDUCATION UNITS

The number of CEUs awarded for a training course corresponds to the duration of the training whose content is eligible under the Program. For example, one hour of eligible content will entitle the licensee to 1 CEU. For a training course to be accredited, the minimum duration of eligible content of a training activity must be 30 minutes. For example, a course with 30 minutes of eligible content will entitle the licensee to 0.5 CEU for completing it.

Duration of eligible training content	Number of CEUs awarded
30 minutes	0.5 CEU
1h	1 CEU
2.5 hours	2.5 CEU
3.75 hours	3.5 CEU

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To be eligible, a training activity must meet the recognition criteria. There are cases where the number of CEUs differs from the actual duration of the activity. For example, in an activity such as a convention or seminar, the periods scheduled for representation, non-eligible topics and meals do not count as training hours.

The training courses completed by licensees are entered in their records. They are also posted in the Register of licence holders on the OACIQ website.

2. CONTINUING EDUCATION ACTIVITIES ACCREDITED BY THE OACIQ

By way of this accreditation procedure for continuing education activities, the OACIQ wishes to give licensees access to a range of training activities, in order to cover various aspects and types of real estate transactions.

2.1. ELIGIBILITY CRITERIA

Before analyzing the content of a training activity, the OACIQ shall verify that the activity meets the following eligibility criteria. To be eligible, an activity must:

- support the OACIQ's public protection mission;
- comply with broker ethics and the legal environment of real estate brokerage and real estate agency management;
- contain a learning structure and have education value;
- contain eligible content for a minimum duration of 30 minutes (see clause 1);
- comply with the OACIQ's position-taking;
- have a clear and direct link with practice and professional development needs in residential or commercial real estate brokerage, or agency management;
- be delivered in a classroom or online (asynchronous or synchronous) as part of a workshop, seminar, conference or convention, in a classroom, self-study or webinar setting;
- cover one of the subject matters eligible for accreditation under the Program (see section 2.4).

2.2. ELIGIBILITY OF PROVIDERS AND TRAINERS

A provider or trainer must notably have the necessary probity to provide training activities, granting CEUs to OACIQ licence holders.

Based on the seriousness of the charges on his record, a provider or trainer may not be accredited to provide training activities under the Program, especially if he:

- is the subject of a guilty decision by the OACIQ Discipline Committee or another professional order;

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- has been convicted of, or has pleaded guilty to, a criminal or penal act or offence related to his professional activities;
- has been convicted of, or has pleaded guilty to, an offence related to the illegal practice of real estate brokerage;
- has been the subject of a decision of the civil court that holds him responsible in a matter related to his professional activities;
- has taken positions affecting reputation, for example, through social media comments or any other controversial activities, etc.

All eligibility criteria of content offered by providers and trainers are assessed at the Organization's discretion, including the consideration of any element that may be related to their professional activities and real estate brokerage activities.

2.3. EXAMPLES OF INELIGIBLE ACTIVITIES (NON-RESTRICTIVE)

- Any basic training activity required to become an OACIQ licence holder;
- Any training relating to the licence holder who acts as a real estate investor, developer or lender (unless it focuses on ethical rules);
- Personal growth activity;
- Activity dealing with synergology or any other related subject;
- An activity that is based on foundations or concepts that do not enjoy consensus among the scientific community;
- Activity or portion of activity dedicated to the promotion of a product or service;
- Activity that has already taken place and will not be repeated;
- Activity mainly involving internal procedures;
- Activity that does not include educational content, such as a cocktail reception or a study or interest group (board, committee, etc.);
- Annual general meeting of an organization;
- Activities for which the OACIQ has reserved the right to act as sole provider (see section 9).

2.4. ELIGIBLE TRAINING SUBJECT MATTERS

To be eligible under the Program, the training activity must deal with at least one of the subject matters referred to in section 49 of the *Regulation respecting broker's and agency licences*, including:

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- General or special legal rules that apply to brokerage transactions described in section 1 of the *Real Estate Brokerage Act* (CQLR, c. C-73-2);
- Any legislative or regulatory reform that may affect the activities of brokers and agencies;
- Content, use and drafting of contracts and forms relating to brokerage transactions described in section 1 of the *Real Estate Brokerage Act*;
- Any material, physical or environmental consideration that may affect the object of a brokerage transaction described in section 1 of the *Real Estate Brokerage Act*;
- Ethics and professional conduct of real estate brokers and agency executive officers;
- Management of the professional activities of real estate brokers and agencies, including the following subjects:
 - Basic accounting;
 - Business plan, marketing of professional services and solicitation (including ethical and legal elements relating to advertising and solicitation);
 - Negotiation;
 - Management of time, timelines, follow-ups and teamwork;
 - GST and QST;
 - Tax laws;
 - Broker's remuneration;
 - Record documentation;
 - management of a trust account;
- Assessment of the value of an immovable or enterprise;
- Assessment of the quality and construction features of an immovable;
- Financial implications of transactions described in section 1 of the *Real Estate Brokerage Act*;
- Financing of transactions described in section 1 of the *Real Estate Brokerage Act*.

3. ANALYSIS OF TRAINING ACTIVITY

3.1. DEADLINE TO SUBMIT AN APPLICATION FOR ACCREDITATION

An application for accreditation of a training activity must be submitted to the OACIQ at least ninety (45) days before the activity.

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3.2. ANALYSIS CRITERIA

The OACIQ will analyze the activity based on the following criteria:

- Eligibility of the application;
- Content of the activity and relevance to public protection;
- Clear and direct link with the practice of residential or commercial real estate brokerage, or agency management (may have a link with several fields);
- Skills that the training activity will help develop;
- The title of the activity clearly states the subject of training and avoids commercial wording that strays from perfection in terms of compliance or public protection;
- The training title must clearly reflect its content;
- Expertise, experience and skills of each trainer or provider on the activity's topic;
- Quality of the documentation or training materials;
- Compliance with the additional training activity's stated objectives;
- Accuracy of the information imparted (well documented references);
- Thoroughness of the mechanism ensuring the imparting of up-to-date information;
- Duration of the activity versus its stated objectives.

Before making a decision regarding an application for accreditation, the OACIQ reserves the right to request attending, at its convenience, a pilot training session.

The final decision will be taken and forwarded to the provider after determining if the content, duration of the activity and the trainers, organizations or educational establishments are qualified to deliver the training activity covered by the general application for accreditation.

3.3. CATEGORIES

As stipulated in section 3 of the *Policy on continuing education* of the OACIQ, a licence holder must complete a sufficient number of training activities relating to the activity of real estate broker to accumulate a minimum of 20 CEUs per two-year cycle, including mandatory training activities provided by the OACIQ totalling 10 CEUs, in addition to 10 elective CEUs.

A licence holder bearing the "certified AEO" or "AEO" title must complete training activities relating to the activity of broker to accumulate a minimum of 24 CEUs per two-year cycle, including mandatory training activities of the OACIQ, totalling 12 CEUs, in addition to obtaining 12 elective CEUs.

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The licence holder must choose, among recognized training activities, those that best suit his needs. However, he is required to complete all the mandatory training activities of the Organization.

Any training activity must help protect the public and allow brokers and agency executive officers to acquire, maintain, update, improve and perfect the skills required in a real estate transaction, and must be related to at least one of the topics listed in section 2.4 of this procedure.

Topics related to those listed in section 2.4 are also accepted, provided that they contribute to improving or perfecting the skills and knowledge relating to the activity of broker and that everything is sufficiently documented and based on accurate and verifiable knowledge.

3.4. DOCUMENTS TO BE SUBMITTED WITH THE APPLICATION FOR ACCREDITATION

For each activity to be accredited, the Continuing Education Department will examine the application if the following information and materials are provided:

- Duly completed *Application for accreditation of a training activity*;
- Payment of analysis fee (this fee is not refundable whether or not the training activity is accredited);
- Detailed training plan;
- Objectives achieved at the end of the activity;
- Training documents and, if the training courses are online, user codes and passwords to access them;
- Training activity updating process, including identification of changes made;
- Information on each trainer (name, contact information, curriculum vitae, where appropriate, consents required for verifications, licence number of the OACIQ, of a professional order or a professional association, if applicable);
- Contact information of the educational establishment, if applicable;
- Email and mailing addresses of the applicant for follow-up purposes;
- Date or number of times the activity will be delivered;
- Billing address;
- Name of person in charge of billing.

3.5. APPLICATION PROCESSING TIME

The applicant shall be informed of the decision by email within approximately forty-five (45) days following receipt of the duly completed application for accreditation, including all documents listed under section 3.4 of this procedure.

Please note that any application that is not completed by the provider within 30 days of receipt or for which the last correspondence from the OACIQ has received no response shall be closed. All documents received shall then be destroyed. No refund shall be issued.

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4. MONITORING OF ACCREDITED TRAINING ACTIVITIES

4.1. UPDATING OF THE ACCREDITED TRAINING ACTIVITY

It is the provider's responsibility to make sure that the information imparted to the learners is up-to-date and complies with current laws and regulations each time the accredited training activity is delivered. The Organization puts in place verification and monitoring mechanisms to ensure this throughout the cycle or according to legislative and regulatory changes that occur during the cycle.

4.2. CHANGES TO A TRAINING ACTIVITY

Any change made to a training activity, other than an update (e.g. statistics), must be approved by the Organization before the training activity is delivered again (see the *Request for modification of a training activity form*), failing which accreditation may be revoked. Fees may apply.

4.3. VALIDITY PERIOD OF THE ACCREDITATION

Once granted, the accreditation of a training activity is valid for the duration of the cycle, i.e. until April 30, 2025.

5. ATTENDANCE LIST AND LOGIN REPORT

The provider shall submit attendance lists and all required documents in the manner indicated by the Organization and keep attendance lists **at least two months following the end of the cycle** in which the training activity was accredited. The OACIQ may ask the provider to produce its attendance lists or login reports. If such lists are not available, the OACIQ will not allocate CEUs to participants.

6. MONITORING AND QUALITY CONTROL OF TRAINING ACTIVITIES ACCREDITED BY THE OACIQ

- For the entire accreditation period of a training activity, a person designated by the OACIQ shall be allowed to attend this activity free of charge, and at its convenience, for quality assurance purposes. The OACIQ reserves the right to survey participants in any activity provided.
- Training activities shall be evaluated by participants using the appreciation questionnaires provided by the OACIQ or a questionnaire provided by the provider and approved in advance by the Organization.
- The provider undertakes to forward the questionnaires to the OACIQ, at its request, within five (5) days following the date of such request.
- The OACIQ may ask the provider to modify the training if it does not meet the criteria mentioned in section 2.1 or if it differs from what was submitted at the time of accreditation.
- The OACIQ may ask the provider to change the trainer if he/she no longer meets the criteria mentioned in section 2.2.

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7. UNDERTAKINGS BY TRAINING ACTIVITY PROVIDERS

7.1. COMPLIANCE WITH THE REAL ESTATE BROKERAGE ACT AND ITS REGULATIONS AND THE RULES SET OUT IN THIS PROCEDURE

- The provider recognized by the OACIQ must comply with the rules set out in this Procedure and cannot assign his accreditation to a third party.
- The provider is responsible for making sure the activity offered meets the needs of learners.
- The provider must make sure that the trainer (if applicable) has the skills required to present the accredited activity and submit the application of any new trainer to the OACIQ for approval, before he delivers his first training.
- The provider must make sure that the trainer respects the public, licence holders, the Organization, its mission and employees.
- The provider must ensure that the trainer acts diligently, especially by refraining from making remarks and avoiding any situations that are or would be incompatible with the goals, directions and policies of the Organization or that pose or could pose a risk of damaging the reputation or the interests of the OACIQ.
- When completing an application for accreditation of a training activity, the provider must make sure that its trainer(s) (if applicable) provide accurate information concerning their work experience and skills and, where appropriate, the consents required for verifications. He must also inform trainers that the OACIQ will validate their eligibility according to the criteria set out in section 2.2.

7.2. COMPLIANCE WITH THE CONTENT SUBMITTED FOR ACCREDITATION

- When delivering a training activity, the provider must, among other things, make sure that its trainers:
 - 1° respect the training plan and duration submitted to and previously approved by the OACIQ;
 - 2° impart information in compliance with the *Real Estate Brokerage Act* and the regulations thereunder;
 - 3° act competently;
 - 4° take into account the limits of their skills and knowledge and the means at their disposal;
 - 5° have an attendance list signed by all participants at the beginning and end of the training activity or keep a login report, showing that the activity is attended by each participant throughout its entire duration;
 - 6° check that the identity of the persons signing the attendance list matches the signature and that they attended the entire training;
 - 7° have brokers complete an appreciation questionnaire on the accredited training activity.

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- The provider is aware that it or any trainer offering on its behalf an accredited training activity may be called upon to explain the content of the provided training activity to various bodies, including the OACIQ Discipline Committee, as a witness.
- The provider must ensure that the trainer meets the criteria indicated in section 2.2.

7.3. CERTIFICATES OF ATTENDANCE AND AWARDING OF CEUs

- The provider shall, within a maximum period of 10 days following the training, award CEUs to participants via the *Professional Development Portal*.
- The provider shall keep the attendance lists, the login reports, and the appreciation questionnaires completed by an activity's participants during the entire accreditation period (and the following two months).

7.4. ADVERTISING AND REPRESENTATIONS

- The provider shall not, in any way whatsoever, engage or allow others to engage in advertising that is false or that could mislead the target audience as to the activity it delivers or could be called upon to deliver.
- The title of the course and the content must be exactly the same as those accredited by the Organisation.
- When a course is included in an event (symposium, trip, etc.), the advertising must clearly indicate which training courses are accredited and the number of CEUs for each of them.
- More specifically, the provider shall not claim or suggest in its advertising that:
 - 1° the content of a training activity it delivers is recognized by the OACIQ, unless specifically authorized to do so by the latter;
 - 2° its trainers have experience or skills that have not been recognized by the OACIQ, if this is not the case.
- The advertising may mention that the training is accredited by the OACIQ and leads to the allocation of continuing education units recognized under the OACIQ's MCEP. Such advertisement shall be used only during the accreditation period and shall use the following wording: **Continuing education activity accredited by the OACIQ.**
- Advertising may indicate that an accreditation application has been submitted to the OACIQ for this training activity; if applicable, it must use the following wording: Application for accreditation submitted to the OACIQ (or pending accreditation). However, it should neither mention or suggest that it will be accredited and recognized under the Mandatory Continuing Education Program of the Organization, nor indicate any number of CEUs before accreditation.

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7.5. SINGLE EVENTS, SYMPOSIUMS, FORUMS, PROGRAMS

- A maximum of 4 CEUs can be awarded for a single event. A single event is an activity such as a symposium, forum, convention, etc., which occurs only once (offered only once during the cycle).
- A maximum of 10 CEUs can be awarded for multi-day programs or events.
- Where several training courses that have been accredited separately are presented in an event, the event promotion must present them individually and not as a whole with the total number of CEUs. That is to say, the number of CEUs awarded for each training course must be indicated. In the case of a single event, the maximum 4 CEUs rule will apply.

8. CONFIDENTIALITY CLAUSE

Each of the parties, their representatives and staff undertake to protect the confidentiality of any information that comes to their knowledge or to which they may have had access as part of the accreditation procedure and to treat it as such and not share, communicate, copy or otherwise use any such information..

9. UNDERTAKINGS BY THE OACIQ

Once a training activity is accredited by the OACIQ, the latter undertakes to post according to its standards on its **Professional Development Portal**:

- the provider's training activity;
- the number of CEUs allocated; and
- a link to follow for more information or for registration.

The list of training courses completed by a licence holder during the current cycle is posted in his record on the *Professional Development Portal*, as well as in the *Register of licence holders* on the **oaciq.com** website.

The OACIQ may recognize more than one training activity delivered by different applicants that cover the same subject matter, within the same category, and that meet the accreditation criteria.

The OACIQ reserves the right to impose mandatory trainings activities and be their sole provider. The provider acknowledges that these training activities may cover themes and topics addressed in whole or in part in training activities it offers and that are already accredited, and waives any recourse in this regard.

The Organization reserves the right to be the sole provider of activities related to the structure and processes of the Organization, its services and committees.

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10. WITHDRAWAL OF THE ACCREDITATION

The accreditation shall be withdrawn as soon as its validity period expires.

In addition, the OACIQ reserves the right, at any time, to withdraw the accreditation of one or more portions of a provider's accredited training activities in case of default by the latter to comply with the undertakings, obligations or requests hereunder.

Without limiting the generality of the foregoing, the OACIQ shall have the right to withdraw the accreditation in the following cases:

- If the provider fails to submit changes to a training activity to the OACIQ for approval;
- If the content of a training activity is no longer relevant;
- If the provider or one of his trainers who obtains his accreditation under false pretences, is, notably, but not restrictively, found guilty of an offence by the Discipline Committee, is the subject of a disciplinary decision by a professional association or order or a decision of a civil, criminal or penal court, which holds him accountable for a matter related to his professional activities, or becomes ineligible for a reason listed in section 2.2;
- If the evaluations completed by the participants and the OACIQ show an unsatisfactory level of quality;
- If the provider or one of its representatives comments on or denigrates the OACIQ, its mission, employees or any other body attached thereto (committees, working groups, services);
- If the provider is in default of payment for over three months for the fees charged as a result of the allocation of CEUs to participants.

Once accreditation is withdrawn or suspended, the training activity's listing and all related links shall be removed from the OACIQ's *Professional Development Portal* and training calendar. In addition, the provider shall cease, without delay, any advertising to the effect that the training is accredited or leads to the allocation of CEUs recognized under the OACIQ's Mandatory Continuing Education Program, and shall make no representation to this effect or suggesting this.