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# **CERTIFIED PROFESSIONAL LOGISTICAN (CPL) PROGRAM OPERATIONS MANUAL**

**SOLE - THE INTERNATIONAL  
SOCIETY OF LOGISTICS**



**1 April 2015**

**CERTIFIED PROFESSIONAL LOGISTICIAN PROGRAM (CPL)  
OPERATIONS MANUAL**

*Document Control*

Dates of issue for all original pages are 1 April 2015.

This Manual replaces the CPL 1 October 2005 SOLE CPL Operations Manual in its entirety.  
Future changes will be made by footnote annotation to the text, with the corresponding record of Change Authority documented in the “Notes on Change Authority” section at the end of this document.

## Foreword

This Certified Professional Logistician (CPL) Program Operations Manual (“Manual”) documents the official duties and responsibilities of all personnel involved in the conduct of the CPL Program within SOLE – The International Society of Logistics (“SOLE”, “the Corporation” and/or “the Society”). The information provided herein is intended for use by those personnel responsible for the management and direction of the CPL program at all levels of the Society.

This Manual provides guidance and procedures, and is subordinate – in ranked order – to the SOLE Bylaws, SOLE Operations Manual and SOLE corporate operating procedures and policies. In the event of a conflict between this Manual and any of the aforementioned documents, the aforementioned documents take precedence, unless otherwise directed by the Executive Board of Directors of SOLE.

Changes to this Manual are subject to the approval of SOLE’s Executive Board. Recommended changes, deletions, or additions to this Manual should be initiated by submission of a Document Change Request to SOLE Headquarters.

Additional information concerning the programs and policies of SOLE may be obtained by contacting SOLE Headquarters at the current address as noted on the SOLE web site ([www.sole.org](http://www.sole.org)).

NOTE: Whenever the masculine noun/pronoun is used it shall be construed to include equally the feminine and neuter noun/pronoun.

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## **Section 1: INTRODUCTION**

### **1.1 SOLE Organization and Placement of the CPL Program Within the Society**

SOLE – The International Logistics Society (“SOLE”, “the Corporation,” or “the Society”) is an international, non-profit professional society of individual and corporate members dedicated to the advancement of the art and science of logistics technology and management. The Society charters and authorizes chapters to provide local members with a forum for furthering the goals and objectives of the Society and providing mutual support at the local level (whether finite or virtual). These SOLE chapters engage in a wide variety of professional activities in pursuit of these objectives. The Society provides for intermediate areas of chapter coordination by Districts based on geographical areas for mutual coordination and promotion of the Society.

This Manual is provided as a guide for operations of the CPL program and details the responsibilities of and the performance guidance for those individuals working on the program in the Society. This Manual is reflective of the operational guidelines for the Society.

The CPL exam is conducted three times each year. On the first Saturday in May and the first Saturday in November, exams are administered at multiple locations, globally. In addition, a single site offering is offered in conjunction with and administered at the location of the annual SOLE conference. The same exam is given at all locations on each exam day. The exam is conducted in four segments, during a continuous sitting.

#### *1.1.1 SOLE Corporate Organization*

SOLE was organized and incorporated under California law as a general non-profit corporation on 1 July 1966. The Society is recognized as a non-profit organization under Section 501(c)(3) of the Internal Revenue Code, based on its stated purpose of “the advancement of the art and science of logistics technology through literary, educational and scientific endeavors.” SOLE has an international membership of professional, technical and management personnel engaged in the fields of logistics planning, operations and education. Chapter operations are designed to support these goals. All chapters and their activities are subject to the ongoing oversight and management of the Society’s Board of Directors and the Society’s Executive Board of Directors. As noted in the Bylaws of the Society, Districts and Chapters in the United States are chartered by SOLE, and are barred from further incorporation or IRS registrations; while chapters located in Europe or other countries are permitted – when required - to incorporate and register under local laws.

#### *1.1.2 The CPL Program within SOLE*

The CPL program in SOLE is organized under the Vice President, Education with operational control falling under the standing Education Committee. (See the Standing Program Operations Procedures for details on this committee) Multiple functional elements of the Society combine to provide operational interaction for the conduct of the program. These elements include the Education Committee, The Director of Certification, the Exam Principals, The Qualifications Review Board, Local Chapters, Exam Proctors, and SOLE Headquarters.

##### *1.1.2.1 The Education Committee*

The Education Committee provides overall guidance on the definition of the Body of Knowledge for the profession. This Body of Knowledge provides the foundation for the content of the examination itself.

##### *1.1.2.2 The Director of Certification*

The Direction of Certification provides the overall integration and management of the exam and the component elements thereof.

### *1.1.2.3 The Exam Principals*

Exam Principals – appointed by the Director of Certification and confirmed by the Executive Board of Directors – are appointed based on both their demonstrated status and position in the academic community, and their expertise in the area of logistics for each of the parts of the exam as covered in the Body of Knowledge. Exam Principals select the representative question set that will be used each time the exam is conducted. Questions may be generated by the Principals, solicited from members who are already certified as CPLs or from other members of the academic community with credentials in the area of the exam. Answer Keys are provided directly by each Principal to the grading institution.

### *1.1.2.4 CPL Qualifications Review Board*

The CPL Qualifications Review Board provides the professional expertise necessary to review all candidate applications to validate their standing to sit for the exam.

### *1.1.2.5 Local Chapters*

Local chapters provide the initial educational guidance and conduct programs for the development of logisticians. (Note there is no specific educational program to prepare for the CPL exam.) Chapters provide the initial evaluation of the candidate's application to sit for the examination. In addition, the chapters assist in the identification of locations and proctors for the conduct of the examination.

### *1.1.2.6 Exam Proctors*

Exam proctors provide the oversight and validation of the professional integrity of the conduct of each exam site. They are the representatives of SOLE at the site and manage all exam activities at the site, to include test administration.

### *1.1.2.7 SOLE Headquarters*

SOLE Headquarters provides the administrative support necessary to the conduct of the examination. Included in this activity are the processing and coordination of the applications for the examinations, coordination of the locations and proctors for the conduct of the examination, notification to the candidates on the status of the application and assignment to the test sites for the exam, distribution of exam materials to the proctors for use in the exam, and collection of all exam materials as returned by the proctors.

## **1.2 Intellectual Property Policy**

SOLE's intellectual property – including but not limited to the trademarked SOLE logo, SOLE artwork, SOLE's name and/or copyrighted material and the CPL logo – may only be used by the district and chapters in the conduct of the authorized activities of SOLE. The use of intellectual property shall be in accordance with proscribed and published guidelines, or – in the absence of published policy – only as approved by SOLE Headquarters. No individual member is authorized the use of any SOLE specific intellectual property unless and specifically as approved by SOLE Headquarters. Further, with the exception of the use of the CPL designation by a duly certified CPL, the use of the CPL logo and designation may only be used in connection with the CPL program. The use of any/all of SOLE's intellectual property by individual members, chapters, or districts of the Society except as approved is expressly prohibited and subject to the appropriate statutes and laws governing copyright and trademark usage, protection and enforcement.

## **1.3 Non-Discrimination Policy**

No member, chapter, district or any operating entity of SOLE – The International Society of Logistics may discriminate against an individual because of race, color, creed, sexual orientation, educational achievements, or any other classification as defined by local or national statute.

## **Section 2: The Certified Professional Logistician Program**

This section provides basic information for the conduct of the CPL program within the Society. The section is organized based on the activities in the program process.

### **2.1 General**

Logistics is a professional discipline. The SOLE Certified Professional Logistician (CPL) Program recognizes the professional stature and ethics of logisticians within commercial, defense and aerospace related industries, in federal and local government agencies, and academic and private institutions. The adoption of a Professional Certification Program in October 1972 was an additional major step by SOLE to further the accreditation of professionals in the logistics field. Certification recognizes the functional interrelationships within the professional responsibilities of logisticians, regardless of their occupational roles.

Certification as a Professional Logistician will be awarded to individuals of proven competence in logistics who pass a rigorous examination designed to test their knowledge of the entire logistics field.

The CPL exam is comprised of four parts, covering the following general fields of logistics:

- Systems Management (Part 1)
- System Design and Development (Part 2)
- Acquisition and Production Support (Part 3)
- Distribution and Customer Support (Part 4)

The Professional Certification Program is administered by the Director of Certification, under the Vice President for Education and in conjunction with the Education Committee. A Certified Professional Logistician Qualifications Review Board (CPL QRB) is responsible for reviewing the eligibility of applicants.

Examinations are held three times a year and are conducted by a chief proctor (and assistant proctor, if necessary), assigned by SOLE Headquarters. The chief proctor must be a CPL. However, in the event a CPL is not available to serve as proctor, an attempt should be made to obtain a test administrator from a local educational institution or, in the case of the armed forces, from the nearest education center. The examinations are prepared and graded by the SOLE Education Committee.

The CPL examination is a certification examination that requires stringent security measures be exercised before, during and after the examination. Applicants must take the examination on the scheduled testing date and at the scheduled time. The only exception to this policy will be for religious reasons. This exception must be requested by the applicant in writing not later than 60 days prior to the scheduled examination date. The request will be verified by SOLE Headquarters and reconfirmed by the applicant. When an exception to policy is granted for religious reasons, the examination will be conducted within 24 hours of the originally scheduled examination date using a different proctor (who must be a CPL) than the one used during the regularly scheduled examination.

The Certified Professional Logistician examination is conducted during one continuous eight-hour period that consists of four two-hour sessions. Initially the candidate sits all four parts; and must pass all four parts to be certified – either in one sitting; or by passing three of four parts in one sitting, and then passing the remaining part in a subsequent sitting.



Candidates who successfully pass the CPL examination and meet all other requirements of the Society are awarded a special certificate. Successful candidates are awarded the designation “Certified Professional Logistician, SOLE - The International Society of Logistics.”

## **2.2 Body of Knowledge for the CPL Program and Examination**

The CPL program is founded on the established Body of Knowledge for the logistics profession, as defined by the Education Committee of SOLE. This defined Body of Knowledge is continually evolving and changing to meet the needs of and reflect the changes in academia, industry, and governments throughout the world. It is documented in the CPL Study Guide available on the SOLE Website.

## **2.3 Educating Logisticians in the Body of Knowledge**

The education of logisticians in the areas defined in the Body of Knowledge is primarily an individual responsibility. Individual logisticians are expected to maintain their knowledge and experience in all areas of the profession. Courses at local educational institutions, on line courses, industry conducted training, and chapter training sessions all play a role in this effort. It is incumbent upon the local chapter management team to sustain a level of professional proficiency and knowledge such that chapters offer members training to meet the latest developments in the profession.

## **2.4 Application for the CPL**

Applications and program brochures for the CPL program are available on the SOLE website.

Individuals qualified to seek the status of Certified Professional Logistician should complete the application for examination.. If non-affiliated or unable to secure applications from the local chapter, a written request providing name, address, and SOLE affiliation should be sent directly to SOLE Headquarters.

### *2.4.1 Examination Eligibility*

The minimum requirements necessary for an applicant to be eligible to apply for the CPL examination are:

Professional Experience – Nine years experience in practicing or teaching logistics;

*Educational Equivalents – Each academic year of undergraduate accredited course work in logistics subjects is equivalent to one year of professional experience, with undergraduate credits limited to the equivalent of four years experience.*

OR – Bachelor’s degree plus five years experience. The degree must be in one of the following fields of logistics as identified in the application. These include but are not limited to degrees of study in the fields of program management, engineering, manufacturing, transportation or supply chain management;

OR – Master’s degree plus four years experience;

OR – Doctoral degree plus three years experience.

Accredited courses that are claimed as equivalent experience must be supported by a photocopy of an official transcript.

To be considered relevant to this application, experience claimed by CPL applicants must be in at least two fields of logistics with a minimum of two years experience in each field. Individuals with doctoral degrees need only have three years experience in one logistics field. The four fields of logistics for documentation of experience:

- Systems Management
- Systems Design and Development
- Acquisition and Production Support
- Distribution and Customer Support

SOLE membership is not a requirement for CPL application.

#### *2.4.1.1 Supporting Documentation*

The application for the CPL examination must be accompanied by supporting documentation in the form of letters of reference, endorsements, copies of awards and citations (if they document required experience). Documentation requirements are described in the “CPL Application Instructions,” found at Appendix C.

#### *2.4.1.2 Certification Fees*

The application fees are set by the Executive Board for members and non-members, and must accompany the application. The application fee is not refundable once it has been accepted by Headquarters. The application must be resubmitted with payment of an additional application fee after four examination dates have passed (beginning with the first examination after Acceptance Notification) if no examinations have been taken or less than three parts have been successfully completed.

The initial and reexamination fee for members and non-members are also set by the Executive Board. The appropriate fee must be paid at the time of application for examination or reexamination. The examination fee is required for all reexaminations, whether taking one, two, three or four (all) parts of the examination.

#### *2.4.1.3 Chapter Role in the Application and Examination Process*

The CPL program (i.e., processes, procedures, security measures) - as are all certification programs - is held to an extremely high level of legal requirements, precautions, operational procedures and restrictions. All information regarding both an individual's certification and recertification is considered highly confidential. Privacy of records must remain a priority. All persons submitting certification information, either with their initial application or for re-certification, should do so with full confidence in the certifying entity's ability to securely retain those records.

Local chapters are responsible only for the initial review of the candidates' application for completeness, and accuracy. They may and should perform an initial evaluation of the application to make sure the candidate has met all requirements to sit for the exam. Chapters are a valuable part of the process in that they should coordinate for local facilities where the exam may be conducted; and identify to SOLE Headquarters CPL members who potentially could act as proctors for the local exam sites.

Once the application passes through the chapter chair any and all subsequent information regarding the candidate for certification and/or re-certification is entirely between the individual, the CPL Qualifications Review Board, the proctor and SOLE Headquarters. While Chapter Chairs, District Directors, SOLE management and even the individual's employer usually have nothing but the highest and best of intentions in inserting themselves into the process, doing so puts the entire program at risk and - more often than not - may even leave the Society vulnerable to unnecessary exposure (e.g., litigation) when the individual's privacy is violated. That means that:

- No one other than the proctor can ask for the names of the candidates sitting for the exam, whether the question is directed to SOLE Headquarters, the Chapter Chair or the Proctors. The individual's right to take/retake the exam as 'anonymously' as possible is part of his/her right to privacy, and cannot be suborned or waived by anyone other than him/her - and even then, if it impacts another candidate the individual cannot grant that right. Anyone that does so puts himself/herself and the Society at great risk of litigation for violating law.

- The emails regarding times and locations of exams are only to go between the proctor and the candidates. SOLE Headquarters gets a copy only so that they can ensure during test day that a site doesn't have to close down because something is missing or can't be couriered/faxed.

- No exam results or scores can be/are given by SOLE HQ to anyone other than the candidate. The only person that can tell the Chapter Chairs/District Directors/Proctors, etc. how he/she did is the individual himself/herself. To support that, SOLE Headquarters does not 'publish' the list of successful candidates until well after the candidates have been advised of their scores and standing. At no time will the names of anyone who didn't pass be revealed.

## **2.5 Qualifications Review Board (QRB)**

### *2.5.1 Application Review*

The Applications from individual candidates are forwarded by the International Headquarters to all members of the QRB. This board reviews all applications and determines if the individuals meet the established criteria to sit for the examination.

If the QRB determines that the candidates are qualified to sit for the examination, they notify SOLE Headquarters and the candidate is scheduled for the examination.

If the QRB determines that the candidate does not meet the established qualifications to sit for the exam they notify SOLE Headquarters of the deficiency in the application. SOLE Headquarters will notify the candidate who may either submit additional documentation, or appeal the decision as to their qualification.

If the additional information is presented and on review of the QRB the candidate is still deemed not qualified to sit for the exam they may defer until they do meet the qualification or appeal the decision.

### *2.5.2 Appeal of the QRB Decision*

Should the candidate appeal the decision of the QRB they must notify SOLE Headquarters in writing not later than one week after being notified that they were considered not qualified to sit for the exam. An e-mail message to Headquarters will be considered as written notification and a request for the appeal.

The application will be forwarded to the Director of Certification and the Vice President of Education for review by an independent panel of three educators selected from the education committee. This panel will be formed and review the application within one week of the appeal being filed at SOLE Headquarters. SOLE Headquarters is responsible for forwarding all application materials to the members of the review panel.

The panel will review the application and notify SOLE Headquarters in writing through the Director of Certification. SOLE Headquarters will notify the candidates of the decision of the appeal panel. The decision of the appeal panel is final and no further consideration will be offered.

## **2.6 Setting up for the CPL Examination**

### *2.6.1 Examination Preparation*

Two months prior to the examination date the exam principals select the question set for use on that exam. These are forwarded to SOLE Headquarters for reproduction and distribution. Answer keys are forwarded to the grading institution for use in evaluating the candidates' answers after the exam is completed.

Questions are developed from the Body of Knowledge materials by the Exam Principals using the guidelines in Bloom's Taxonomy at all six levels.

The parts of the exam and the allocation of questions to the individual disciplines in the field of logistics are not fixed but follow the following guidelines:

**2.6.1.1 Part 1. Program Management**

Concepts of Systems and Logistics (40%)

Program Management (60%)

**2.6.1.2 Part 2. Distribution and Customer Support**

Physical and Supply Distribution (60%)

Customer Support (30%)

System Equipment Phase Out and Disposition (5%)

Analytical Methods (5%)

**2.6.1.3 Part 3. System Design and Development**

System Design (50%)

Design Support Disciplines (15%)

Design Reviews (10%)

System Test and Evaluation (25%)

**2.6.1.4 Part 4. Distribution and Customer Support**

Physical Supply and Distribution (60%)

Customer Support (30%)

System Equipment Phase out and Disposition (10%)

**2.6.2 Candidate Allocations to Exam Sites**

The approved candidates for the examination will be assigned to an exam location by SOLE Headquarters based on their geographic location and availability of proctors to conduct the exam.

**2.6.3 Selection of an Exam Site**

Exam sites are selected by SOLE Headquarters based on the candidate locations, and availability of suitable sites in the area. The sites must meet the following criteria:

- Large enough to host all candidates with tables and chairs that allow them to be seated without being able to see each others papers; and.
- All candidates must remain in the immediate view of the proctor at all times while they are in the exam rooms.

#### *2.6.4 Selection of Proctors for the Exam*

The proctors for the exam are to be selected from the following:

- Local logisticians with the CPL designation; or
- Military Educational Facilities; or
- Local Educational Institution Academic Professor; or
- Corporate management at least two levels higher than the level of the candidate sitting for the exam.

Once selected the designated proctor must complete the training, briefings and certificates necessary to ensure the integrity of the exam.

### **2.7 CPL Examination**

The examination is conducted during one continuous eight-hour period, which consists of four, two-hour sessions, one for each part of the examination. (Note: for countries where English is not the primary or secondary language the exam is conducted in four three-hour sessions over a continuous two day period.)

Initially, the CPL candidate takes all four parts at one time and must pass all four parts to be certified as a CPL. If less than three of the four parts are passed by the candidate, all four parts must be retaken to qualify as a CPL. If three parts are passed, the candidate may retake only the one part failed but must do so within the next four examination dates. Beyond the next four examination dates all four parts must be retaken.

Multiple-choice questions are used, and the examination is closed book.

Passing score for each/all parts is a straight grade of 60.

Slide rules or portable calculators are acceptable, but no reference material, other than that authorized by SOLE, is permitted in the testing area. Calculators must be non-programmable, or if programmable must have their memory cleared in the presence of the proctor prior to the exam. Candidates who do not have a primary or secondary familiarity in the English language may have a translation dictionary for their use. All dictionaries must be inspected by the proctor prior to the exam and may not contain any marks or other entries. These must be language translation dictionaries only and may not contain formulas or lengthy text descriptions of terms or processes. (For a complete set of “Instructions to CPL Exam Candidates,” see Appendix D, this Manual.)

Prior to being allowed to take the examination, all candidates must sign an “Affidavit of Understanding and Compliance for Candidates” (see Appendix E, this Manual). Upon completion of the Exam and collection of all testing material, the Proctors return all examination papers and administrative material to SOLE Headquarters for grading. Results are sent to the Director of Certification for review, and to SOLE Headquarters for notification of the candidates. Following this review, SOLE Headquarters will then notify each individual of his or her grade.

The individual candidates are only offered their grades on each part of the examination. There is no attempt made to direct future study efforts in a sub area and no indication given of specific questions missed on the exam.

As explained in Section 2.4.1.3, above, any information concerning the results of individual scores, including pass/fail information, will be given only to the individual concerned. Following the examination, overall results, to include pass/fail percentages will then be published by the Society.

### *2.7.1 Candidate Challenges to Individual Exam Questions*

Candidates may offer a challenge to individual questions on the exam by making entries on their comment sheets and notifying the proctor of the challenge. Proctors will make note of the challenge on their report to SOLE Headquarters. The individual Exam Principals will evaluate the challenge based on the academic foundation used in the generation of the exam. Any questions ruled invalid will be removed from the baseline for grade computation. No notification will be made of the challenge or the results of the review.

## **2.8 Post Exam Activities**

At the conclusion of each exam the candidate exam sheets are consolidated at SOLE Headquarters and forwarded to the grading institution for evaluation.

Exam grades for each candidate are reported to SOLE Headquarters by the grading institution, and the candidates notified of the results.

### *2.8.1 Candidate Challenges to the Exam Results.*

There are no provisions allowed for challenges to the exam results.

## **2.9 CPL Certificate and Designation**

Upon successful completion of the examination, SOLE Headquarters will notify applicants. SOLE Headquarters will prepare and forward, unless otherwise notified, a letter of commendation and the CPL certificate to the individual identified on the examination application. Each new CPL will receive a CPL pin and a CPL identification card.

The professional designation of “Certified Professional Logistician (CPL), SOLE – The International Society of Logistics” may be used in a dignified manner similar to recognition accorded to the, accounting, insurance and other professions. Either the full expression or the initials “CPL” may be used after the individual’s name on business cards and stationery in a manner compatible with the dignity of the Society.

## Section 3: Recertification

### 3.1 Purpose

SOLE recertifies CPLs to maintain the credibility of the CPL designation and to be competitive with other professional certifications. Recertification will encourage CPLs to participate in SOLE activities, provide service and leadership to the international logistics community and to continue to contribute to the logistics profession.

### 3.2 Guidelines

CPLs must recertify every five years by accumulating 50 recertification points, approximately ten points per year.

Recertification activities and their associated points are listed in Table 3-1.

SOLE members have no recertification fee.

Non-SOLE members must pay a recertification fee of \$75.00 per year evaluated to cover administrative costs.

There is no “grand fathering.”

The initial recertification period began on 1 June 1999.

### 3.3 Program Administration

Submit documentation to the SOLE Headquarters as the activity occurs.

Use standard form CPL-R-1 for each activity

- Attach supporting documentation to prove the activity was accomplished  
*Examples of supporting documentation: copies of articles, conference brochures, conference fee receipts, transcripts, letters from employer or Chapter Chair (modify form CPL-R-2 as needed)*
- Activities may not be double counted if they fall under more than one category.

SOLE Headquarters will maintain copies of all documentation for at least five years.

#### 3.3.1 CPL Recertification Committee

The CPL Recertification Committee consists of five CPLs selected by the Director of Certification and approved by the Executive Board of Directors. In addition to its primary responsibility for the recertification of CPLs, it also develops and submits recommendations for updating or improving the recertification program; and responds to policy and implementation questions from SOLE membership.

The full scope of the committee’s duties and responsibilities are outlined in “Charter for the CPL Qualifications Review Board,” found at Appendix A, this Manual.

#### 3.3.2 Designation

New CPLs will receive an effective date of CPL designation on their CPL card and certificate.

A CPL who meets the requirements for recertification will be listed as a CPL with the original date the CPL was awarded, along with “recertified” and the date of recertification as awarded by the SOLE Headquarters, in the SOLE Headquarters CPL database and on any official documentation (CPL identification cards, certificates, etc.)

Recertified CPLs will:

- Receive a letter advising of the recertification, and a new CPL card showing both the recertification status and the date of recertification.; and

Be acknowledged in Society publications

A CPL who chooses not to participate in recertification will be listed as a CPL with the original date the CPL designation was awarded in the SOLE Headquarters' CPL database and on any official documentation (CPL identification cards, certificates, etc.) and be identified as "not currently recertified" in response to employment or other enquiries.

### *3.3.3 Other Considerations*

The flexible menu of recertification activities, Table 3-1, is designed to provide equal opportunity for all CPLs to earn points toward recertification.

Local chapter activities are encouraged; and

Travel and expensive training are not required.

Current technical information has increasingly limited "shelf life" making recertification necessary.

Many other professional societies, such as APICS, have recertification or maintenance requirements.





**Table 3-1 Recertification Points and Activities**

<b>CATEGORY</b>	<b>ACTIVITY</b>	<b>POINTS</b>	<b>COMMENTS</b>
1.0 Practicing Logistics			
1.1 Employment	Full-time employment in a logistics-related position	5	Employment must meet same function criteria as those used to evaluate candidacy for CPL exam; points can be prorated to reflect part-time employment or consulting.
2.0 Publications			
2.1 Logistics Spectrum	Publish article	5	Topic must be related to one of SOLE's Application Divisions or other areas of professional interest to logisticians.
2.2 Professional journal with at least national circulation	Publish article	5	Topic must be related to one of SOLE's Application Divisions or other areas of professional interest to logisticians.
2.3 Professional journal with international circulation	Publish Article	5	Topic must be related to one of SOLE's Application Divisions or other areas of professional interest to logisticians.
3.3 Author or co-author a logistics related book		5	Book must be related to one of the fields of Logistics as defined in the requirements for the CPL examination.
3.0 Chapter Activities			
3.1. Chapter Meeting	Give presentation	3	Topic must be related to one of SOLE's Application Divisions or other areas of professional interest to logisticians.
3.2 Chapter Newsletter	Publish article	3	Topic must be related to one of SOLE's Application Divisions or other areas of professional interest to logisticians.
3.3 Chapter CPL Review Course	Teach review course	5	At least twenty hours of classroom instruction; points can be prorated to reflect lesser participation; can include formal mentoring process for CPL exam.

<b>CATEGORY</b>	<b>ACTIVITY</b>	<b>POINTS</b>	<b>COMMENTS</b>
4.0 Education/	Formal Coursework		
4.1 Teaching	Teach College Course	1 point per quarter or semester hour	Topic must be related to one of SOLE's Application Divisions or other area of interest to logisticians; no credit for teaching the same course again within the same year; professional academics limited to 5 points per year for teaching.
4.2 Learning	Attend college course for credit	1 point per Semester hour	Topic must be related to one of SOLE's Application Divisions or other areas of professional interest to logisticians.
4.3 Teaching	Teach course that awards CEU credits.	1 point per CEU course taught.	Topic must be related to one of SOLE's application divisions or other area of interest to logisticians; no credit for teaching the same course again within the same year; professional academics limited to 5 points per year for teaching
4.4 Learning	Attend course that awards CEU credits	1 point per CEU course	Topic must be related to one of SOLE's Application Divisions or other areas of professional interest to logisticians.
5.0 SOLE Conference – National or International			
5.1 Conference	Attend Conference	3	Attend at least one day of technical sessions.
5.2 Conference	Present paper at technical conference	5	Cannot get double credit for presenting paper and publishing same paper in conference proceedings.
5.3 Conference	Publish paper in conference proceedings	5	Cannot get double credit for presenting paper and publishing same paper in conference proceedings.
5.4 Conference	Participation in organizing or as workshop coordinator	3	Cannot get double credit for attendance and participation as workshop coordinator.
6.0 Non-SOLE Conferences –National or International			
			Conference must be related to one of SOLE's Application Divisions or other area of professional interest to logisticians.
6.1 Conference	Attend Conference	3	Attend at least one day of technical sessions.

<b>CATEGORY</b>	<b>ACITIVITY</b>	<b>POINTS</b>	<b>COMMENTS</b>
6.2 Conference	Present paper at technical conference	5	Cannot get double credit for presenting paper and publishing same paper in conference proceedings.
6.3 Conference	Publish paper in conference proceedings	5	Cannot get double credit for presenting paper and publishing same paper in conference proceedings.
6.4 Conference	Participation in organizing or as workshop coordinator	3	Cannot get double credit for attendance and participation as workshop coordinator.
7.0 SOLE Conference - Regional			
7.1 Conference	Attend Conference	3	Attend at least one day of technical sessions.
7.2 Conference	Present paper at technical conference	5	Cannot get double credit for presenting paper and publishing same paper in conference proceedings.
7.3 Conference	Publish paper in conference proceedings	5	Cannot get double credit for presenting paper and publishing same paper in conference proceedings.
7.4 Conference	Participation in organizing or as workshop coordinator	3	Cannot get double credit for attendance and participation as workshop coordinator.
8.0 Non-SOLE Conferences - Regional			Conference must be related to one of SOLE's Application Divisions or other area of professional interest to logisticians.
8.1 Conference	Attend Conference	3	Attend at least one day of technical sessions.
8.2 Conference	Present paper at technical conference	5	Cannot get double credit for presenting paper and publishing same paper in conference proceedings.
8.3 Conference	Publish paper in conference proceedings	5	Cannot get double credit for presenting paper and publishing same paper in conference proceedings.
8.4 Conference	Participation in organizing or as workshop coordinator	3	Cannot get double credit for attendance and participation as workshop coordinator.

<b>CATEGORY</b>	<b>ACTIVITY</b>	<b>POINTS</b>	<b>COMMENTS</b>
9.0 Workshop or seminar			
9.1 Workshop or Seminar	Teach workshop or seminar can be in-house employer training	3 points for each workshop or seminar; at least 6 hours of instruction	Topic must be related to one of SOLE's Application Divisions or other areas of professional interest to logisticians. No credit for teaching same workshop or seminar again within one year.
9.2 Workshop or Seminar	Attend workshop or seminar can be in-house employer training	1 point for each workshop or seminar; at least 6 hours of instruction	Topic must be related to one of SOLE's Application Divisions or other areas of professional interest to logisticians. No credit for attending the same workshop or seminar again within one year.
10.0 SOLE Service			
10.1 International	Serve on international-level committee (technical topic or CPL committee); does not include elected/appointed office in SOLE management hierarchy at any level	5 points per year	Full year of service required with demonstrable accomplishments
10.2 National	Serve on Chapter/District State/Country committee (technical topic or CPL committee); does not include elected/appointed office in SOLE management hierarchy at any level.	3 points per year	Full year of service required with demonstrable accomplishments
10.3 Chapter Officers	Serve as Chapter Officer	1 point per year	Full year of service required with documentation submitted to SOLE Headquarters as part of the Annual Chapter Officer Election Report.
11.0 Non-SOLE Activities	Participation in any other professional organization technical committee	3 points per year	Full year of service required with demonstrable accomplishments. Activities should be related to any field of logistics.

## Appendix A

# CHARTER FOR THE CERTIFIED PROFESSIONAL LOGISTICIAN (CPL) QUALIFICATIONS REVIEW BOARD (QRB)

### A-1. Authority

The Certified Professional Logistician (CPL) Qualifications Review Board (CPL QRB) is a standing committee that assists in the administration of the Society's professional certification program. As such, it functions under the supervision of the Director of Certification, who reports to the Vice President, Education. The Vice President, Education – based on the recommendation by the Director of Certification – shall appoint the Chairman of the QRB (Chair, CPL QRB), subject to Executive Board of Directors (Executive Board) approval.

### A-2. Composition and Members

The CPL QRB shall consist of five members, to include the Chair (who shall be a current CPL and who shall also sit on the Education Committee). Of those, two members shall be academicians. The remaining members shall be current CPLs. No member, except for the Chair as a member of the Education Committee, can be associated in any way with the development of either the policy for or content of the examination. No member of the CPL QRB shall be allowed to serve as a course instructor for CPL exam preparation education. Members shall be appointed by the Chairman and approved by the Executive Board. The members shall be appointed to serve two-year terms. Initial appointment shall be for staggered periods to ensure that overlapping of terms will provide balanced continuity in CPL QRB. Members may, at their choice, succeed themselves, subject to Executive Board approval. Every effort will be made to fill vacancies as expeditiously as possible; however, the business will continue regardless of the number of members, as long as the board has at least two members.

### A-3. Objectives and Responsibilities

#### A-3.1. Objectives.

The objectives of the CPL-QRB are to ensure that candidates for the designation of CPL are applicants that meet the educational and experiential requirements established by SOLE as part of the CPL certification and recertification processes.

#### A-3.2. Responsibilities.

The responsibilities of the CPL-QRB include, but are not limited to, the following:

A-3.2.1. Provide input to the development of, and implement policies that support the professional certification goals of the Society.

A-3.2.2. Support the direction of the Director of Certification; Vice President, Education; and Executive Board in the control and administration of the Society's CPL certification and recertification programs.

A-3.2.3. Review and provide feedback to the Director of Certification and Vice President, Education on CPL examination and exam study materials for the professional certification program.

A-3.2.4. Assist in the development of guidance and standardized procedures for chapter CPL certification/recertification initiatives (to include examination preparation, logistics body-of-knowledge education, and application submission) through the identification, appointment, and management of independent SOLE Chapter CPL Coordinators, who will perform as CPL Program advisors to the Chapters. Further, provide oversight of the application of said guidance and procedures.

A-3.2.5. Develop and maintain guidance for CPL exam application package preparation that will provide firm and clear policy and chapter/district checklists for application content and supporting documentation (e.g., maintenance of CPL application and instructions for completion).

A-3.2.6. Review for approval/disapproval the applications of candidates for the CPL examination to ensure that all approved candidates both meet the published educational and experience requirements established by SOLE; and have specifically demonstrated an educational background and depth of experience that provides a reasonable opportunity to attain certification.

A-3.2.7. Where applications are disapproved, provide specific feedback to the applicant as to the reason for disapproval, and recommended courses of action for subsequent application approval.

A-3.2.8. Develop and maintain both an approved CPL Proctor list; and the Chapter CPL Coordinator list.

A-3.2.9. Establish, validate and keep current CPL exam proctor qualifications and the “Instructions to Proctors.”

A-3.2.10. Examine submitted CPL recertification documentation to ensure that the published recertification requirements are met. Coordinate with the CPL seeking recertification when difficulties and areas of concern arise or additional/clarifying information is required.

#### **A-4. Procedures**

##### *A-4.1. Frequency of Candidate Review.*

Resources permitting, there will be not less than two CPL examinations annually. Those examinations will be conducted worldwide on the first Saturday of May and November, respectively. Additionally, if demand and resources exists, a third examination will be conducted on the Monday immediately preceding the start of the Society’s Annual International Logistics Conference and Exposition.

##### *A-4.2. CPL Examination Candidate Review*

Each candidate’s application will be reviewed in accordance with the criteria contained in this policy document and the candidate either will be approved/disapproved to sit for the examination. The Chairman, CPL QRB will notify (copy to SOLE Headquarters) each candidate of the decision and any additional information required.

##### *A-4.3. CPL Recertification Documentation Review*

Documentation for CPL Recertification will be submitted to SOLE Headquarters, and passed to the CPL QRB for determination of recertification points earned. On an annual basis and in conjunction with SOLE Headquarters, notify participating CPLs of their status toward attaining recertification.

##### *A-4.4. Meetings*

The CPL QRB will meet at the call of the Chairman, as required. Meetings may be conducted either in person (e.g., in conjunction with the Annual International Logistics Conference and Exposition), electronically, or telephonically.

At such meetings, one of the members present shall be designated to take the committee minutes. Minutes approved by the chair shall be provided to all CPL QRB members, the Director of Certification, the Vice President, Education, SOLE Headquarters; and any others deemed appropriate and/or required.

## **A-5. Reports**

### *A-5.1. Recurring Reports.*

The Chairman of the CPL-QRB shall submit not less than semi-annual activity and status reports on CPL QRB functions, coincident with the CPL examinations, to all CPL-QRB members, the Director of Certification, and the Vice President, Education. Other reports will be submitted as requested by the Executive Board or the Vice President, Education.

### *A-5.2. CPL Certification/Recertification Program Improvement*

Both the Chairman and members of the CPL QRB shall be proactive in eliciting suggestions and recommendations for improving the certification program (to include QRB functions) from Chapter CPL Coordinators and examination candidates on a continual basis. All suggestions and recommendations, regardless of merit, shall be forwarded to the Director of Certification. After assessment by all concerned parties, both a recommendation and a proposed response to the suggestor shall be submitted to the Vice President Education for final determination as to the course of action and the response to the suggestor. All suggestions that involve either expenditure of Society resources or change to the Society's established CPL Program guidance and policies will not be implemented without prior approval by the Executive Board or the Board of Directors, as applicable.

## **A-6. Interface Relationships**

The CPL QRB interfaces with other functional elements within SOLE as follows:

- a. SOLE Headquarters - Certification and recertification application, documentation, administration, official record keeping, proctor management and assignment, and candidate notification of successful certification and/or recertification.
- b. Chapter CPL Coordinator - Training, management and oversight.
- c. Chapter Chairs/District Directors – Examination application processing; chapter/district program/training validation for recertification documentation.
- d. Director of Certification/Vice President, Education – Certification/logistics body-of-knowledge study materials review and update; recertification requirements development, review, and maintenance; examination critique (both content and administration); and candidate member identification/representation on the CPL QRB.





# Certified Professional Logistician Examination Application (CPL QRB Form 1)

## Part 1 - Applicant Information

Title First Name Middle Initial Last Name

Address

City/State/Zip Country

Home Phone Work Phone Fax Number

E-Mail Address

**BEFORE COMPLETING THIS FORM, PLEASE READ "INSTRUCTIONS TO APPLICANTS"**

### Part 2 - Qualification Data

A. I, the undersigned, claim qualification to be examined by virtue of having (check one or )

- 1) Nine years experience in practicing and/or teaching logistics . . . . .
- 2) \_\_\_\_\_ years undergraduate courses in logistics & \_\_\_\_\_ years experience in practicing and/ or teaching . . . . .
- 3) Bachelors degree and 5 years experience in practicing and/or teaching logistics . . . . .
- 4) Masters degree and 4 years experience in practicing and/or teaching logistics . . . . .
- 5) Doctoral degree and 3 years experience in practicing and/or teaching logistics. . . . .

B. I have read, understand, and subscribe to the statement of conduct below and certify that all information submitted by me in this application is true. I understand and agree that I may be denied certification, if upon investigation any statement or claim I have made is found to be untrue. I will surrender, upon being asked, any certificate, diploma, or other evidence of professional certification. I further understand that I am not applying to take the examination on a specific date. Upon review and acceptance of my qualifications by the CPL Qualifications Review Board (QRB) I will be notified by mail of the first examination for which I am eligible. This notification shall not be less than two months prior to the examination.

C. The application processing fee submitted with this application must be renewed after four examination dates have passed (beginning with the first examination after QRB acceptance notification) if no examinations have been taken, or less than three parts have been successfully completed. See paragraph 2b(4) of the "Instructions to Applications" for more information.

D. Cancellation Policy: A \$25.00 cancellation fee will be charged if examinee cancels less than 21 days before the exam date. If cancellation is made prior to the 21-day cut-off, fees can be rolled over to the next exam date. At no time will fees be refunded.

### STATEMENT OF CONDUCT

I have read the preamble to the SOLE Code of Ethics, shown on page 4, and will earnestly endeavor to follow its precepts in the conduct of my affairs. I certify that all information submitted by me on my application form(s) is complete and correct.

Signed \_\_\_\_\_ Date \_\_\_\_\_

SOLE Member Number \_\_\_\_\_

District / Chapter \_\_\_\_\_

B-1

revised September 2005

**PART 3 - DESCRIPTION OF EXPERIENCE** (see Note 1 below)

Dates of employment (Mo/Yr)

From \_\_\_\_\_ To \_\_\_\_\_

Applicant's Title \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

Description of Logistics Work

\_\_\_\_\_

Name, Title, Phone Number of Current Supervisor

Dates of employment (Mo/Yr)

From \_\_\_\_\_ To \_\_\_\_\_

Applicant's Title \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

Description of Logistics Work

\_\_\_\_\_

Name, Title, Phone Number of Current Supervisor

Dates of employment (Mo/Yr)

From \_\_\_\_\_ To \_\_\_\_\_

Applicant's Title \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

Description of Logistics Work

\_\_\_\_\_

Name, Title, Phone Number of Current Supervisor

The description of experience stated above agrees with the applicant's personnel records.

SIGNED \_\_\_\_\_

DATE \_\_\_\_\_

Current Supervisor (see Note 2 below)

**NOTES:**

1. Experience must cover the period of years claimed in Part 2. Use additional sheets if necessary. However, each additional sheet must be signed by the current supervisor attesting that the experience stated thereon agrees with the applicant's personnel records.
2. Should be signed by the same individual listed in A above, and the same individual submitting the supervisor's letter of reference.

B-2

*revised September 2005*

**PART 4 - EDUCATION** *(see Note 1 below)*

NAME & LOCATION OF INSTITUTION	FROM	TO	COURSE	DEGREE

THE TRANSCRIPTS OF THE ACADEMIC RECORD LISTED ABOVE ARE FILED IN THE APPLICANT'S PERSONNEL RECORDS

Signed \_\_\_\_\_  
Current Supervisor *(see Note 2 below)*

**NOTES:**

1. Applicant must list all college, university, and graduate studies, and professional development courses (duration of one week or more). Use additional sheets if necessary. However, each additional sheet must be signed by the current supervisor that the education stated agrees with applicant's personnel records.

2. Should be signed by same individual listed as current supervisor on page 2, and the same individual submitting supervisor's letter of reference.

**PART 5 - CERTIFICATION PREPARATION**

Upon successful completion of the CPL program, I wish my name to appear on the certificate as follows:

\_\_\_\_\_

First (Or initial)	Middle (Or initial)	Last name
--------------------	---------------------	-----------

**PART 6 - ADMINISTRATION DATA**

TO BE COMPLETED BY THE CHAPTER CHAIRMAN OR DISTRICT DIRECTOR

**A. PROCTOR INFORMATION**

The following individual will be available to serve as Proctor and administer the CPL Examination. (Note: All proctors shall be CPLs except as noted in paragraph 2f, "Instructions to Applicants.")

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: (Home) \_\_\_\_\_ (Work) \_\_\_\_\_

E-Mail Address \_\_\_\_\_

CPL Yes \_\_\_\_\_ No \_\_\_\_\_

**B. VERIFICATION**

I have found all statements, claims and information, submitted by the above applicant to be complete and verified. An original and four copies of the application are enclosed.

District / Chapter \_\_\_\_\_ Signed \_\_\_\_\_  
Chapter Chairperson or District Director

Date \_\_\_\_\_ Telephone \_\_\_\_\_



**SOLE - THE INTERNATIONAL SOCIETY OF LOGISTICS CODE OF ETHICS**

**Preamble**

The Logician, in consonance with the highest standards of ethical conduct, will

- Accept a personal obligation to the public, employers, clients, and the logistics profession to serve them with honest and competent professional effort.
- Act impartially and vigorously to advance the dignity and the integrity of the logistics profession.
- Share personal knowledge, skill, and experience with others for the improvement of human environment and welfare.
- Support the human rights of all and discourage any form of discrimination because of sex, race, creed, age, political affiliation, or national origin.
- Maintain high standards of excellence in professional performance, personal conduct, and good citizenship.



## C.P.L. Examination Application Instructions to Applicants

**General:** The data requested on the CPL application for (CPL QRB Form 1) will provide the SOLE Certified Professional Logistician-Qualifications Review Board (CPL QRB), the information necessary to properly evaluate and determine an applicant's qualifications for taking the certification examination. Failure to complete the application form correctly will delay the review and approval process.

### Part 1 - Applicant Information - Self Explanatory

### Part 2 - Qualification Data

A. Indicate your claim for qualification by checking one. Education and degrees should be in Engineering, Mathematics, Physics, Chemistry, Economics, Business Administration, Operations Research (to include Statistics and Systems Analysis), Computer (Data) Systems and/or Science.

*If you select claim 2, the number of years of education (not more than 4) must be entered.*

1. To be considered relevant to this application, experience claimed by CPL applicants **must be in at least two fields of logistics with a minimum of two years experience in each field.**

2. Those individuals with a Doctoral degree need to have three years experience in only one logistics field. The four fields of logistics are:

1. Systems Management
2. System Design and Development
3. Acquisition and Production Support
4. Distribution and Customer Support

### B. Self Explanatory

C. The CPL examination is offered twice a year, in May and November. Once notified of application approval an applicant has four consecutive test dates from approval exam date to successfully pass three parts of the examination at one sitting. If the applicant is unsuccessful in passing three parts within the four test dates, he/she must resubmit his/her fees. If an applicant passes three parts of the examination at one sitting, he/she will be permitted to retake the failed fourth part on any or all of the next four examination dates.

D. Cancellation Policy - Once an applicant is approved by the QRB, application fees will not be returned. A \$25.00 cancellation fee will be charged if examinee cancels less than 21 days before the exam or does not sit for the scheduled exam. If cancellation is made prior to the 21 day cut-off, fees can be rolled over to the next exam date. At no time will fees be refunded.

### **Part 3 - Description of Experience**

All applicants must complete Part 3 covering the years of experience claimed in Part 2. Start with present position and provide information for each position in reverse chronological order to a nine (9) year period prior to the month of application or for the number of years of required experience if you are applying for educational equivalents. **Do not leave any time gaps.** If some positions held during the required number of years were not in the logistics field, the total period covered should be extended sufficiently to include the required number of years of experience in logistics. The description of logistics work should indicate the type of work performed and the level of technical or management responsibility (e.g., budget development, number of employees supervised, etc.) Logistics experience can be in the commercial, industrial, government, military and/or academic fields. **Please be as specific as possible.**

Please be sure your supervisor signs this page.

*NOTE: If all or any part of the required number of years of experience were accumulated while self-employed, such as a consultant, provide specific data concerning logistics assignments/contracts performed and reports or other published articles, logistics studies or projects. Provide dates.*

### **Part 4 - Education**

If you select a claim other than claim 1, Part 4 must be completed to support the educational equivalent claimed. Provide the names of schools and/or colleges, years attended, major fields of study and degree(s) earned.

If you have selected claim 2 you must also include titles and dates of special courses and seminars in logistics.

Please be sure this page is signed by your supervisor.

Note: If you are self-employed or your transcript(s) is not on file in your personnel record, you must support this application with a copy of your official transcript(s) obtained from institution(s) attended showing highest degree awarded.

If your education did not lead to a degree and a transcript(s) is not on file in your personnel record, then a copy of your official transcript(s) obtained from institution(s) attended, supporting the years of educational equivalents claimed must be submitted.

### **Part 5 - Certificate Preparation**

Please complete exactly the way you wish your certificate to read.

### **Part 6 Administrative Data** *(To be completed by the Chapter Chairperson or District Director.)*

A. Proctor Information: To insure the timely dissemination of examination materials to authorized personnel, it is important that the requested information be provided. In the event a C.P.L. is not available to serve as proctor an attempt should be made to obtain a test administrator from a local educational institution or, in the case of the armed forces, from the nearest education center.

B. Verification - Self Explanatory

## ***Documentation***

### *Letters of Reference:*

A. A letter of reference from your current supervisor describing your professional competence is required. If you have held your current position for less than six months, an additional letter of reference from a previous supervisor (or a manager/commanding officer in a position to observe your performance) is required.

The sample letter of reference found on page 5 (sample #1) is for the guidance of your supervisor. You should follow the instructions contained in this sample so the supporting documentation is forwarded to the proper address and contains all the information required.

B. For affiliated SOLE members, required letters of reference to support CPL QRB Form 1, page 2, should be mailed directly to their chapter chairperson. Applicants should provide their supervisors with the current names and addresses of their Chapter Chairperson.

It is the responsibility of Chapter Chairs to determine that this documentation is complete prior to endorsing applications to the CPL QRB. Applicants without proper documentation will not receive favorable consideration by the CPL QRB.

C. Applicants who are non-affiliated members of SOLE or who are not Society members, should direct their supervisor to mail the letters of reference directly to:

SOLE - The International Society of Logistics  
14625 Baltimore Avenue, Suite 303  
Laurel, Maryland 20707-4902  
USA

### *Chapter Endorsement:*

A. Any applicant for professional certification by examination who is affiliated with an active SOLE chapter must obtain a letter of endorsement from the chapter chairperson. The reason for local endorsement of affiliated members is two fold.

1. To assure that applicants are completely familiar with application instructions and the stringent requirements for qualification by examination.

2. To assist the CPL QRB with a preliminary screening of applicants based on personal contact and assembly of required documentation.

B. The importance of the professional certification program to SOLE members and the future of the society warrants personal involvement of chapter chairpersons in the program's implementation. Chapter chairpersons should assure themselves that applicants are responsible individuals and that the references and other documentation to support their applications are complete.

C. A letter of endorsement is required from the appropriate District Director if you are not affiliated with an active chapter or not a SOLE member.



D. A sample format of the type of information desired in a chapter/district letter of endorsement is shown on page 6 (sample 2). The applicant, if desired, may include other pertinent information.

### ***Fees***

A. Effective for the May 2006 Exam, the application fee of \$225.00 for members and \$375.00 for non-members is to be included with the application. A refund of the application fee, or any portion thereof, will not be made for any application evaluated by the CPL QRB, whether approved or disapproved. The examination fee for all re-examinations whether taking all four parts or any combination, is \$50.00 for all applicants regardless of member status.

B. The application fee and examination fee (and a new application submitted) must be renewed by payment of an additional fee after four examination dates have elapsed and no examinations have been successfully completed.

### ***Completed Applications***

When completed, an original and four copies of the CPL examination application and its enclosures should be mailed to:

SOLE - The International Society of Logistics  
ATTN: Chairman, CPL QRB  
14625 Baltimore Avenue, Suite 303  
Laurel, Maryland 20707-4902  
USA

*Sample #1*

*Sample Format - Letter of Reference  
(see Instructions)*

Date

SOLE - The International Society of Logistics  
ATTN: Chairman, CPL QRB  
14625 Baltimore Avenue, Suite 303  
Laurel, Maryland 20707-4902  
USA

Dear Sir,

I am advised that (applicant's name) has made application for certification by SOLE - The International Society of Logistics as a Certified Professional Logistician.

My relationship with (applicant's name) is/was (describe nature of relationship and opportunity to observe and/or evaluate applicant's knowledge and abilities, include dates.)

My evaluation of (applicant's name) professional qualifications is (provide confidential opinion of applicant's professional competence in performance of the duties with which familiar, briefly describe these duties

---

*Signature*

---

*Title*

---

*Organization*

---

*Telephone Number*

---

*e-mail Address*

*Sample #2*

*Sample Format - Chapter/District Endorsement  
(see Instructions)*

Date

SOLE - The International Society of Logistics  
ATTN: Chairman, CPL QRB  
14625 Baltimore Avenue, Suite 303  
Laurel, Maryland 20707-4902  
USA

Dear Sir,

I have reviewed and initialed the enclosed application of (applicant's name) for formal certification as a "Certified Professional Logistician" by SOLE - The International Society of Logistics. To the best of my knowledge, the statements therein are complete and are properly supported by the required documentation.

I know of no reason why the applicant should not be considered for professional certification.

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*Chapter Chair (Signature)*

---

*Chapter / District*

## Appendix D

### Instructions to CPL Exam Candidates

Congratulations on your approval by the CPL Qualifications Review Board to sit for the upcoming CPL Exam. While the exam is administered globally on the first Saturdays in May and November; and the day before the Society's annual symposium (U.S. only), there are some specific administrative instructions and candidate responsibilities you need to fully understand and agree to abide by as you prepare to take the exam.

Your Proctor will contact you prior to the exam, advising of the location and starting/ending times for the exam. At that time, he/she also will provide any site-unique instructions (e.g., building admission and/or security log requirements).

Please do not ask your Proctor to make special testing accommodations, other than those necessary for you to physically take the exam (e.g., Americans with Disability Act requirements). Do not ask if the Proctor can make special schedule adjustments for you – if you only have to take one part, you will take it at the same time as everyone else. Don't be late and expect to be granted admission to the testing area once testing has begun.

We realize there are a lot of "don'ts" when it comes to sitting for the exam. These prohibitions are necessary to ensure fairness for all exam-takers, regardless of where the exams are being administered. Asking your Proctor/Assistant Proctor(s) to "make an exception" will serve not only to invalidate your testing and subsequent candidate eligibility, but also open your Proctor to an investigation under the Society's Ethics Violations policies. Don't ask your Proctor for any deviations from standard procedures – he/she does not have the authority to grant them.

Expect to come into the testing area with only those items outlined, below. You will be provided with everything else you need, including additional pencils and scratch paper. You will leave the room with only that which you brought in: anything you write on – to include your scratch papers – will be collected from you before you are released from the testing site.

You will be allowed to bring and keep at your seat the following:

- Additional Number 2 pencils
- Slide rule and/or **non-programmable** calculator
- Beverage, lunch; and/or change for vending machines
- Purses/wallets
- Medication, if required

Specifically, you are prohibited from the use of any and all of the following:

- Books, dictionaries, papers, folders, files, data storage devices, or written materials of any kind, including calculator instruction booklets. *[An exception will be made in countries other than the United States. One dictionary in native tongue translated into English may be available in the front of the room for use by the candidates for translation purposes only. The candidates may leave their seats to use the dictionary one at a time only. They are not to make any comments nor ask the Proctor or anyone else for clarification, understanding, or any other comments.]*
- Programmable calculators, personal data assistants, or computing devices of any kind
- Cameras, tape recorders, or personal listening devices
- Tables, formulas or listings of any kind. If such are required, they will be provided as part of your exam package and will be collected and included with your test booklet(s) and answer sheets.

Any of the following items you bring will be collected from you and kept by the Proctor at the front of the room:

- Outerwear (e.g., coats, gloves, hats, umbrellas)
- Briefcases or portfolios [we recommend you leave them in your vehicle]
- Appointment diaries [we recommend you leave them in your vehicle]

And, it goes without saying, any evidence of cheating, collusion, or assistance – of any kind before, during or after the exam – will immediately cause all testing to be halted for corrective action; and, if warranted, shut down the site.

All things aside, the examination is challenging. But, it is also an intellectually expanding and professionally rewarding experience. ***We wish you all the best!***





**Certified Professional Logistician (CPL)  
RECERTIFICATION POINTS REQUEST  
Form CPL-R-1  
(Please print or type)**

**Date:**

**Name:**

**SOLE Member Number:**

**CPL Number:**

**Full Mailing Address:**

**Telephone Number:**

**Fax Number:**

**Email Address:**

**Category Title and Reference Number:**  
(for example, *Publications, 2.0*)

**Activity Accomplished and Reference Number:**  
(for example, *Publish Article in Logistics Spectrum, 2.1*)

**Points Earned:**

**Describe Supporting Documentation Supplied (Must accompany request and indicate the time, location, full mailing address, and name and telephone number of responsible individual of the activity in order to process):**

(for example, *copy of article and table of contents showing title of article and journal, author, date, etc.; copy of conference fee receipt; copy of conference brochure showing title of presentation and author*)

**Remarks:**

**Notes:**

- CPLs will submit documentation to SOLE HQ as activities occur (ideally, within 90 days):
  - Include documentation from third party to prove activity was accomplished.
  - Documentation required will be copies of articles, conference brochures, conference fee receipts, etc.
  - Activities may NOT be double-counted if they fall under more than one category.

***Always keep a copy of all documents submitted to SOLE HQ for your own records.***

## Exceptions

- CPLs who believe that their professional activities do not fit the standard activity categories may submit a letter of explanation with this form. Include as much supporting detail as possible and any relevant documentation from third parties.
  - SOLE HQ will forward requests for exception to stated policy to the Chair, CPL Recertification Committee.
  - Disagreement with SOLE HQ review and awarding of points for the standard activity categories must be sent to SOLE HQ in writing.
  - The Recertification Committee will review the documentation on exceptions and disagreements and determine the appropriate number of points to be awarded.
  - SOLE HQ will notify the CPL of the Committee's decision.
  - Any disagreement with the points awarded upon initial review of the standard recertification categories, or with the points awarded upon review by the CPL Recertification Committee of an Exceptions Request, must be sent to SOLE HQ in writing within 90 days of receiving the decision.

\*\*\*\*\*

### **SOLE -- The International Society of Logistics**

14625 Baltimore Avenue, Suite 303

Laurel, MD 20707-4902 USA

Phone (301) 459-8446

FAX (301) 459-1522

e-mail: [solehq@erols.com](mailto:solehq@erols.com)

[www.sole.org](http://www.sole.org)

\*\*\*\*\*

### **FOR SOLE OFFICE USE ONLY**

**Date Received:**

**Received By:**

**Supporting Documentation Approved By:**

**Points Awarded:**

**Date Entered in CPL Recertification Database:**

**Remarks:**

Appendix G



**Certified Professional Logistician (CPL)**  
**CHAPTER ACTIVITY RECEIPT**  
**Form CPL-R-2**  
*(Please print or type)*

**Chapter Name and Number:**

**Date of Chapter Meeting:**

**Name of Meeting Attendee:**

**Title and general subject area of Technical Presentation:**

**Category Title and Reference Number: Chapter Meeting Attendance, 3.4**

**Points Earned: (.4 points per Chapter Meeting with Technical Presentation)**  
*(Attendance required at 5 Chapter Meetings with Technical Presentations in order to earn 2 points, the maximum permitted annually in Category 3.4)*

**Name of Chapter Chair or other Chapter Board Member:**

**Signature** \_\_\_\_\_

**Telephone Number:**

**Fax Number:**

**Email Address:**

**Remarks:**



## **Notes on Change Authority**