

# CII CPD accreditation standards

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CPD accreditation standard	Description	Examples of evidence
<b>1. Learning outcomes</b>		
<p><b>1.1 Aims and objectives</b></p> <p><i>The learning outcomes should be clearly stated, relevant and met by the learning activities.</i></p>	<ul style="list-style-type: none"> <li>• Training needs analysis process</li> <li>• Clear aims and objectives</li> <li>• Learning outcomes reflect regulatory requirements, where appropriate, and business objectives</li> <li>• Structured learning activities linked to learning outcomes</li> <li>• Learning outcomes are specific, measurable and time-bound</li> <li>• Learning is relevant to delegates' professional development needs.</li> </ul>	<ul style="list-style-type: none"> <li>• Process for identifying training needs</li> <li>• Clear link to the business requirements and any regulatory requirements</li> <li>• Event description and participant invitations</li> <li>• Aims and objectives documented</li> <li>• SMART learning outcomes</li> <li>• Structured approach to the learning</li> <li>• Training materials reviewed by CII.</li> </ul>
<b>2. Learning</b>		
<p><b>2.1 Learning design and delivery</b></p> <p><i>The learning and development activity should be of a high standard and the methods used should be appropriate for the audience and the activity undertaken.</i></p> <p><i>Training materials should be clear, current, relevant and technically balanced.</i></p>	<ul style="list-style-type: none"> <li>• Contributes to delegate knowledge and skills development</li> <li>• Learning content has a clear structure, logical flow and links to learning outcomes</li> <li>• Learning activity is designed to respond to delegate ability and learning preferences</li> <li>• Learning activity is interactive and varied</li> <li>• Language, pace and style are appropriate for the audience</li> <li>• Content is relevant, technically accurate, balanced and up-to-date</li> <li>• Content is suitable for individuals with protected characteristics</li> <li>• Conducive learning environment.</li> </ul>	<ul style="list-style-type: none"> <li>• Meets the requirements of the CII CPD scheme</li> <li>• Training plan and trainer notes</li> <li>• Clear explanations of terminology</li> <li>• Relevant facts with examples</li> <li>• Regular review of learning outcomes</li> <li>• Inclusion of learning cycle and a range of learning preferences in the design of the event</li> <li>• Training is designed or modified to suit the delivery method/audience</li> <li>• Participant feedback</li> <li>• Equality &amp; Diversity risk assessment</li> <li>• Training observation by CII</li> <li>• Training materials reviewed by CII</li> <li>• Interviews by CII.</li> </ul>

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<p><b>2.2 Trainer competence and credibility</b></p> <p><i>Trainers/speakers and training designers should demonstrate a high level of competence and relevant experience.</i></p> <p><i>NB for e-learning this standard applies to content authors. For events with speakers, this standard applies to speakers.</i></p>	<ul style="list-style-type: none"> <li>• Trainers/speakers/training designers have relevant training skills and experience</li> <li>• Trainers/speakers/training designers maintain their competence and have up-to-date knowledge</li> <li>• Trainers/speakers have planned and prepared for their session</li> <li>• Trainers/speakers do not make overt appeals for clients, promote products or criticise competitors</li> <li>• Trainers/speakers/training designers maintain a high standard of professional conduct</li> <li>• Trainers proactively seek feedback.</li> </ul>	<ul style="list-style-type: none"> <li>• Profiles of trainers/speakers/training designers demonstrate they have relevant technical/training credentials</li> <li>• Relevant qualifications held by trainers/speakers/content writers</li> <li>• Trainer CPD activity</li> <li>• Trainer notes and training plan</li> <li>• Competence standards used for selection and monitoring</li> <li>• Dry run/practice sessions are used to prepare</li> <li>• Participant feedback</li> <li>• Interviews by CII.</li> </ul>
<p><b>2.3 Professional</b></p> <p><i>A professional approach should be taken by the organisation, taking into account all regulatory, legislative and ethical behaviour requirements.</i></p>	<ul style="list-style-type: none"> <li>• Senior level sponsorship and support</li> <li>• Professional qualifications/professional standards promoted</li> <li>• Complies with legislative and regulatory requirements</li> <li>• Clear and unambiguous learning event information</li> <li>• Content and training delivery is unbiased and free from product or service promotion</li> <li>• Events have suitable venues with access to facilities, refreshments and staff assistance</li> <li>• CPD hours calculated on a consistent and accurate basis.</li> </ul>	<ul style="list-style-type: none"> <li>• Support for CII professional body</li> <li>• Trainers/speakers/content writers have professional body membership</li> <li>• Financial service/insurance qualifications promoted</li> <li>• High standard of conduct by employees, trainers and speakers</li> <li>• FCA requirements met (where appropriate)</li> <li>• Procedures/guidelines documents</li> <li>• Complaints &amp; feedback process</li> <li>• Advertising literature is not misleading</li> <li>• High quality training materials</li> <li>• Promotional activity is clearly separated from the CPD activity</li> <li>• Participant feedback</li> <li>• Training observation by CII</li> <li>• Training materials reviewed by CII</li> <li>• Interviews by CII.</li> </ul>

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<b>3. Evaluation</b>		
<p><b>3.1 Quality and consistency</b></p> <p><i>There should be clear methods of ensuring that standards are maintained and that learning and development activities are undertaken and delivered to consistent levels.</i></p>	<ul style="list-style-type: none"> <li>• Process in place to ensure learning materials remain technically accurate, up-to-date and are of a high quality</li> <li>• Procedures to ensure training is delivered to consistently high standards</li> <li>• Monitoring to prevent misuse of documents, information or certificates</li> <li>• Processes to prevent breach of copyright laws and content licence arrangements</li> <li>• Feedback is reviewed and acted upon.</li> </ul>	<ul style="list-style-type: none"> <li>• Guidance is provided on the standards for delivery and design</li> <li>• Regular review of learning activities, training material and feedback</li> <li>• Content, references, quotations, examples are up-to-date, relevant and accurate</li> <li>• Feedback is obtained from trainers/speakers and participants</li> <li>• Monitoring processes in place. Areas identified for improvement are acted upon</li> <li>• Training observation by CII</li> <li>• Training materials reviewed by CII</li> <li>• Interviews by CII.</li> </ul>
<p><b>3.2 Evaluation of learning</b></p> <p><i>Mechanisms should be in place to evaluate the effectiveness of the programme. They should include a link to the training needs analysis.</i></p>	<ul style="list-style-type: none"> <li>• Process in place to identify whether the learning outcomes were met</li> <li>• Method to identify the delegate learning experience</li> <li>• Process to identify whether delegate development needs have been met by the CPD activity</li> <li>• Regular review of the CPD activity to ensure it remains 'fit for purpose.'</li> </ul>	<ul style="list-style-type: none"> <li>• Identification of how the learning outcomes will be measured</li> <li>• Before and after comparisons used</li> <li>• Formal testing</li> <li>• Reflective statements</li> <li>• Range of evaluation processes used</li> <li>• Success rates/satisfaction ratings reviewed.</li> </ul>

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<p><b>3.3 Record keeping</b></p> <p><i>Robust processes should be in place to ensure effective record keeping of the learning and development activities, delegate attendance and any assessment activities.</i></p>	<ul style="list-style-type: none"> <li>• Effective and accurate recording of procedures relating to the learning event</li> <li>• Accurate delegate attendance and results records</li> <li>• Feedback/complaints recording process</li> <li>• Records of evaluation and review process</li> <li>• Proof of attendance documentation includes the event and delegate details.</li> </ul>	<ul style="list-style-type: none"> <li>• Guidance available on the operation of the learning event</li> <li>• Contracts in place e.g. venue hire</li> <li>• Policies such as Health &amp; Safety at Work clearly displayed</li> <li>• Process for ensuring up-to-date documents being used</li> <li>• Attendance records maintained</li> <li>• Any certificates of attendance issued have the CPD activity detail, date and participant name listed</li> <li>• Feedback records maintained</li> <li>• Checks in place to ensure the integrity of the record keeping</li> <li>• Documents reviewed by CII</li> <li>• Interviews by CII.</li> </ul>