Chartered
Insurance
Institute

Standards. Professionalism. Trust.

Submitting your CPD Record

A Practical Guide

thepfs.org
cii.co.uk

Contents

3. What is CPD and why is it important?
4. What does the CII CPD scheme involve?
5. What activities are acceptable?
6. How to compile your CPD record
7. Recording your CPD
9. Final check before submitting your CPD record
9. Submitting your CPD record
10. Common CPD misconceptions
11. Glossary of key terms

If you're still getting to grips with the CII's CPD scheme, and its specific rules and requirements, the following guidance is designed to help you.

It will save you time by helping you provide the right information first time, and avoid having your record returned for further work or correction.

What is CPD and why is it important?

The benefits of keeping your knowledge up-to-date through Continuing Professional Development (CPD) are well known, but it's important to remember that CPD is also a compulsory requirement of your CII/PFS membership.

Making CPD a mandatory requirement for qualified members of professional bodies is standard practice, reflecting the fact that knowledge gained through qualifications quickly dates.

CPD also ensures that CII/PFS member designations and titles are more than simply a demonstration of study completed: they require a commitment to keeping this knowledge up to date.

The CII's CPD scheme helps you maintain the knowledge and skills necessary to succeed in a competitive market.

What does the CII CPD scheme involve?

In summary, all qualified members, whether based in the UK or outside the UK, need to:

- complete a minimum of 35 hours' compulsory CPD in a 12 month period
- of which at least 21 hours must be structured CPD (see the glossary for a definition).

For an activity to be included in your CPD record it must be a minimum of 30 minutes – although you may combine shorter activities if they are undertaken to meet a specific development need, and record them together.

Full details of the CII's CPD scheme can be found at **cii.co.uk/cpd** including:

CPD Briefing document – containing full details of the CPD scheme, its rules and requirements; suitable activities and how to record your CPD.

CPD FAQs – answering common CPD queries.

Note: PFS members who have opted-in to the Later Life Advice or Retirement Planning specialisms within the online your money adviser register also commit to undertake an additional 10 hours' structured CPD focused on this specialism in each 12 month period.

What activities are acceptable?

An indicative list of suitable CPD activities can be found in the briefing document at **cii.co.uk/cpd**

The list is subject to regular review so we recommend you view details online.

The list is long and includes many activities typically undertaken in the workplace. Some may be obvious, but others may surprise you:

- Training courses and workshops
- Conferences, seminars and webinars
- Examination and tests
- Formal discussions/meetings
- On-the-job training
- Internal training
- Training for others
- Self-managed learning
- E-learning
- Examination setting, marking and moderation
- Technical authorship
- Reading and watching
- Mentoring/coaching/shadowing
- Pro bono or voluntary work
- Professional institute/PFS regional network or trade body work
- New product development

You will find detailed descriptions online, with guidance as to which are typically considered 'structured' or 'unstructured' learning – which may vary based on your personal circumstances.

Please note the above list are those currently recognised, other activities may be acceptable – if in doubt, please contact the CII.

The CII's CPD scheme is self-certifying, and development activities should only be recorded where they have assisted your professional learning and development. As a member you are bound by the CII Code of Ethics to be honest in your declarations.

How to compile your CPD record

It is important that you provide all the required information when completing your CPD activity record to ensure we are able to accept your submission first-time.

Each activity must contain all of the following information – please refer to the form provided with your CPD record request or view online at **cii.co.uk/cpd** where you will also find sample completed CPD records.

1. Your development needs
The skills and knowledge you have identified as needing to develop through CPD activities.

2. Title of each activity you undertook to meet those needs
For example, 'completed CII exam unit P05' or 'attended a seminar on pensions changes'.

3. Activity description/learning objectives
Describe briefly the activity or activities undertaken to meet a particular development need, e.g. 'In-house training' and what you are expected to know, understand or do as a consequence.

4. CPD activity type
The activity (or code in the case of the provided paper form) from the provided list that matches your activity, e.g. 'Conferences, seminars and webinars'.

5. Whether the activity was structured or unstructured
Remember you need a minimum of 21 hours of structured CPD per 12 month period. See the glossary for a definition of these terms.

6. The time you recorded against each CPD activity
Individual activities need to last at least 30 minutes to be eligible, although you may group shorter activities undertaken to address the same development need, provided they are all either structured, or unstructured. You will need to include a single reflective statement covering the grouped activities.

7. Period of CPD activity
Either:

- Provide your CPD record for the 12 month period ending in the submission deadline included on the request letter.
- Submit your most recent annual record of CPD activity where the period is within two months of the submission deadline. Where there is a gap greater than a month since your last record was completed, we may request details of more recent CPD activity.

8. A reflective statement of your learning activity
Your statement should describe how and to what extent the activity met your development needs, in what ways you consider it was effective as a method of learning, and how it benefited you professionally, e.g. 'The example calculations provided within the learning material helped me develop the necessary understanding of the methods of calculating business interruption premiums. I now feel confident that I have the required technical knowledge in this area.'

Where an activity did not meet the development need fully, this can still count as valid CPD, but you need to specify what other activity you will be undertaking to meet this in full.

9. Supporting evidence
To verify your record, the CII may ask you to provide corroborative evidence in respect of a particular activity, e.g. a training provider's certificate of attendance and the corresponding event programme. We recommend that you record evidence. Please do not submit supporting evidence unless specifically requested.

Recording your CPD

You can use any method to record and submit your CPD, providing it includes all the required information.

To make matters as straightforward as possible, we recommend using the CII's free CPD planning and recording tool. It is available at **cii.co.uk/cpd** (it can also be found with the various CII Assess tools and within CPD Essentials).

The tool sets out all the information you must provide in detail. Once completed you can submit online to the CII.

Alternatively, you can complete and return the paper form sent to you with your CPD record request.

To support this process, you can also download the CII CPD App to enable CPD activities to be recorded and managed on-the-go. Visit **cii.co.uk/cpd** for more information.

Other formats may also be accepted, most commonly employer CPD records. Please ensure you include all the required information (detailed previously) to avoid your record being returned for further work or correction.

You can see examples of completed CPD records online: **cii.co.uk/cpd**

Final check before submitting your CPD record

Make sure you've included all the required information:

1. You have completed 35 hours of CPD including a minimum of 21 hours of structured CPD ☐
2. Your record covers a full 12-month period ☐
3. That all required information has been provided for each activity
   - i) Your development needs ☐
   - ii) Title or description of each activity you completed to meet those needs ☐
   - iii) Activity description and learning objectives ☐
   - iv) CPD activity type ☐
   - v) Whether the activity was structured or unstructured ☐
   - vi) The time you have recorded against each CPD activity ☐
   - vii) A reflective statement of the outcomes achieved of the learning activity ☐

Please note that we do not return submitted CPD records, so please keep a copy. You should not submit evidence, such as attendance sheets, certificates, articles read etc. unless specifically requested to do so.

Submitting your CPD record

You can submit your record in any of the following ways:

1. Directly from the CII CPD online planning and recording tool

2. By email to: **cpdreport@cii.co.uk**

3. By post to: CII CPD Team, 3rd Floor, 20 Fenchurch Street, London, EC3M 3BY

The CII carries its equal opportunities policy through to the CII CPD scheme. Provisions can be made for members who have different requirements or disabilities where appropriate. If you have a disability or a condition which you believe should be taken into consideration when submitting your CPD record, you should contact the CII CPD Team.

Common CPD misconceptions

Each year a significant number of members fail to submit their CPD record. Frequently it is because they mistakenly believe the CPD requirement doesn't apply to them. As a guide, we've highlighted some of the most common misconceptions below:

Common misconceptions excusing the need to undertake CPD	Actual position
I'm based outside the UK	All qualified CII/PFS members, irrespective of country of residence, are required to undertake CPD
I'm an experienced practitioner of many years standing/employed in a senior role, so it's not relevant for me	Experience doesn't excuse members from CPD. Every member irrespective of position and experience is required to undertake CPD
I'm an ACII/FCII/Chartered title holder so I don't need to do CPD	All qualifications holders, irrespective of the level of qualification held, are required to do CPD
I work in a non-client facing role	CPD is about being competent to do your role. This applies to all members irrespective of whether you have a client facing or internal focused role
My development needs aren't suited to CPD activity, such as studying for a qualification, attending a training course, a conference or the like	The CII CPD scheme recognises a broad range of activities, well beyond those traditionally associated with CPD, making it suitable for all practitioners
I will be retiring soon, so it's not relevant to me	Until such time as you do retire, you have committed to and are required to undertake CPD. In any event the request for your CPD record relates to the preceding 12 months

Glossary of key terms

Development needs – the skills and knowledge you have identified as needing to develop and in respect of which you will be undertaking CPD. These might be subjects or skills you identified as part of an annual performance review, or may relate to a change of role or additional responsibility.

Learning objectives – what you are expected to know, understand or do in your day-to-day job, or to prepare you for a role to which you aspire, as a result of the CPD activity.

Structured CPD – the undertaking of any learning activity purposely to meet a specific development need.

Unstructured CPD – any activity an individual considers has met a learning objective, but which may not have been undertaken to meet a specific development need, e.g. general reading of the trade press.

Reflective statement – a 'reflective' statement of your learning activities (answering questions such as: "Did the activity meet my learning needs? How has the activity benefited me professionally?") and including information such as the effectiveness of the learning and learning method.

The Chartered Insurance Institute
1st Floor, 30 Old Broad Street

London EC2N 1HT

tel: +44 (0)20 8989 8464

customer.serv@cii.co.uk
cii.co.uk

Chartered Insurance Institute

@CIIGroup

© The Chartered Insurance Institute 2021

THE CHARTERED INSURANCE INSTITUTE, CII and the CII logo are registered trade marks of The Chartered Insurance Institute.

COH_J013025 (10/21)