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CPD accreditation standards

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CPD accreditation standards

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

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

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

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