

Continuing Professional Development Standard

TABLE OF CONTENTS

DEFINITIONS	1
PURPOSES AND SCOPE	1
PROFESSIONAL DEVELOPMENT CONCEPTS	2
CPD STANDARD REQUIREMENTS	2
CPD REPORTING REQUIREMENTS	3
NON-COMPLIANCE	3
EXEMPTIONS	4
RELEVANCE	4
MEASUREMENT	4
VERIFICATION	5
ACKNOWLEDGEMENT	5

APPENDICES

- Appendix A Examples of eligible activities and credits earned
- Appendix B Example of a completed record
- Appendix C Blank recording form (available in Excel if required) Only to be submitted if requested.
- Appendix D Blank declaration form, sent to members at time of membership renewal time.

DEFINITIONS

For the purposes of this document, the following definitions apply:

Association refers to Association of Professional Driving Instructors of Ontario Inc.

Member refers to any person who has conformed with the appropriate requirements to become and remain an Affiliated Member (.....joiningor later) or Affirmed Member in good standing with the Association and who has not resigned or been expelled. Affiliated members joining before are exempt from declaring compliance with this standard until they pass the affirmation exam.

Continuing Professional Development (CPD) refers to learning activities that develop and maintain capabilities to enable member practitioners to practice competently within their chosen area of Road Risk Management (In-vehicle &/or In-class)

The Committee refers to The Standards Committee responsible for the design and implementation of the Continuing Professional Development program.

PURPOSES AND SCOPE

One of the key benefits of membership in the Association is the opportunity to maintain and enhance professional knowledge and skills in the areas in which a member chooses to practice. The membership approved a motion at an Annual General Meeting to impose a requirement of participation in a program of continuing professional development. This motion included the provision that successful completion of a minimum level of CPD is a mandatory component for any member to continue in good standing.

The resulting program as described herein is the product of efforts of the Standards of Practice Committee to design and implement a program that best suits the unique needs of the Association and its Members. As part of the development process, the Committee identified certain principles on which such a program should be based:

- a) A member should strive to sustain professional competence by keeping informed of, and complying with, the developments in the acknowledged standards of the profession in all areas in which the member practices or is relied upon because of the member's profession.
- b) A member should undertake continuing education and professional development activities in accordance with the Standards of Practice established by the Association.
- c) This Standard is designed to ensure fairness by establishing minimum requirements.
- d) This Standard recognizes that the knowledge and competencies required of each member will differ depending on the service or services that member provides. As a result, the types of programs and activities recognized as qualifying for CPD credit must be as varied and flexible as possible.

- e) This Standard must be viewed as an evolving document. Practitioners in the fields of accounting, bookkeeping and tax operate in an environment that is constantly changing. As a result, regular reviews and updates of the CPD program are necessary.
- f) As a federally chartered organization that accepts members from all provinces, this Standard must be recognized as a national program.

The existence of a CPD program will benefit all members in a number of ways. It will provide confidence in every member that, like themselves, their fellow members are maintaining a minimum level of knowledge and skills necessary to serve their clients and enhance the reputation of the Association. It will demonstrate to potential members and current members' clients that members are required to keep up to date in their chosen fields of professional practice. By ensuring all members maintain and update their knowledge and skills, the Association's ability to lobby on the members' behalf is strengthened.

PROFESSIONAL DEVELOPMENT CONCEPTS

This standard reflects the requirement for continuing professional development activities to be based on three primary concepts: relevance, measurement and verification.

Relevance: This refers to the content of the CPD and requires activities that are expected to develop the knowledge, skills, values, ethics, and attitudes of the member practitioner that are relevant to his or her current and future work environment and professional responsibilities. Section 8 provides further direction on the relevance of content.

Measurement: Members must be required to measure learning activities or outcomes to meet the CPD requirement in accordance with the "CPD Standard Credits Requirement" stated in Sections 4 and 9 of the Standard.

Verification: A certain portion of the learning activities engaged in must be verifiable. This means that the learning can be objectively confirmed or corroborated by a competent source. Members shall retain appropriate documentation and upon request, must provide sufficient evidence to demonstrate that the activity has been verified. Section 10 provides examples of evidence of verification.

CPD STANDARD REQUIREMENTS

- a) Every member shall accumulate a minimum of 120 credits on a moving total basis for each three-year reporting period ending December 31.
- b) Every member shall earn a minimum of 20 credits annually.
- c) Of the 120 credits required, a minimum of 60 credits must be verifiable learning.
- d) A member shall retain documentation to support the credits claimed for the most recent three-year reporting period.

CPD REPORTING REQUIREMENTS

- a) Credits are to be recorded annually on a calendar year basis, using the prescribed form (appendix C) to demonstrate a member's participation in the CPD program. An example of a completed form is shown in appendix B. The form is to be retained in the event that CPD activities are audited. Compliance with this standard is to be provided, by way of declaration, at time of membership renewal.
- b) The Association will send a declaration form with membership renewal notices each spring.
- c) Documentation including the prescribed form, may be subject to audit. Members shall retain the appropriate documentation to support credits claimed for the most recent three-year reporting period. Examples of appropriate documentation could include a syllabus, receipt, confirmation of seminar attendance, or written description of the professional development activity.
- d) In general, documentation need not accompany the report; however, for some categories the Association may require a description of the activity or claim.

NON-COMPLIANCE

Initial steps taken to address non-compliance shall focus on bringing the member into compliance within a reasonable period. Care needs to be taken to strike a balance between a sanction that, in substance, amounts to permitting a member to defer or avoid compliance with the CPD requirement and one that is excessively punitive.

If a non-exempt member fails to achieve:

the minimum required number of credits in the three-year reporting period or,

the minimum number of credits per year

the following course of action will be taken:

The member will be notified in writing of the apparent shortfall.

The member will be required to submit a written response to the notice of apparent non-compliance within a specified period of time. The member must either dispute or confirm the credit shortfall. If the member has not submitted a written response to the notice of apparent non-compliance within a specified period of time of the receipt of the notice of the apparent shortfall, the member will be deemed to have confirmed the credit shortfall. Based on receipt and approval of an appropriate action plan to remedy the shortfall, the Association may allow an extension period of up to one year, which normally would be December 31 of the year following the shortfall.

If, subsequent to the extension period, a member is still found to have accumulated fewer than the required number of credits, the member will not be in compliance with the Association's Standards of Practice.

EXEMPTIONS

Exemption from the continuing professional development requirements may be granted to:

members who have been granted retired status;
members who have extenuating circumstances (such as continuing ill health); or,
members who have been granted Life Membership and are no longer in active practice.

Application for exemptions must be made in writing and such application must be approved by the Committee. Should the application be denied or should a member no longer qualify for exemption, the member must resume reporting immediately.

A member must commence the program upon completion of the first full calendar year after joining (2018 or later) or after becoming an Affirmed Member. At the discretion of the Committee, a member may be allowed to commence reporting CPD activities earlier.

RELEVANCE

Given that members practice in a wide variety of positions which require knowledge and skills in a number of different subject areas, topics qualifying as relevant CPD may include, but are not limited to the following:

In Vehicle Driving Instruction, In-Class Driving Instruction, First Aid, Senior Program, Skid Pad, Corporate Training, DUI & MVA-Rehabilitation, Business Accounting, behavioral and social sciences, budgeting, business and management theory, business communication, insurance, interpersonal skills, Road Risk Management.

Language development activity may be acceptable if it is relevant to a member's current practice.

Activities such as attendance at courses, seminars and technical sessions qualify as relevant continuing professional development. Other activities such as developing, presenting or teaching related courses, seminars or workshops, participation in special interest groups and self-directed study may also qualify as continuing professional development. If the member participates in an activity that satisfies the general approach to continuing professional development outlined in this Standard but is not specifically listed in 8 a), the member should forward a detailed description of the activity to the Association for consideration.

MEASUREMENT

Professional development activities can be measured in terms of effort or time spent, or through a valid assessment method which measures the competence achieved or developed.

VERIFICATION

The Standard requires a minimum of 60 credits of the 120-hour requirement to be verifiable learning (see section 4), based on the concept that a certain portion of the CPD learning activities engaged in may be objectively confirmed or corroborated by a competent source. “Verifiable” is distinguished in the Standard from “measurable” (see Section 3). Some learning activities may be measurable (e.g. in terms of time) but not verifiable (e.g. in terms of evidence).

Examples of evidence of verification:

Course outlines, teaching materials

Attendance records, registration forms or confirmation of registration from providers

Confirmation by an instructor, mentor, or tutor of participation

Confirmation by an employer of participation in an in-house program

Independent assessment of learning outcomes and/or performance objectives achieved

Publication of a professional article or the results of a research project

Evaluation of written or published material by a reviewer

Periodic re-examination

Other qualification or certification

Other assessments such as assessments or sign-offs by associations with appropriate documentation of demonstrated development of competence, or assessments by regulators (e.g. license to perform a service).

ACKNOWLEDGEMENT

It is acknowledged that this Standard takes from and is based upon a thorough review and understanding of the practices of other professional bodies including other accounting bodies, and has been adapted to meet the specific needs of this Association and its Members.

APPENDIX A**EXAMPLES** of eligible activity and credits earned.

Where applicable the actual credits will be as shown on the CPD certificate awarded at the event.

Requirements: 120 credits over a moving 3-year cycle

Seminars & courses	Typically 1 credit per hour	
	Full day	7-8 credits
	Half day	3-4 credits
	APDIO events are awarded – 2 full days	30 credits
	APDIO events are awarded – 1 full day	15 credits
Webinars	Typically 1-4 hours, per hour	1 credit/hr
	APDIO events are awarded – 1 full day	15 credits
Community College / Night School	Lecture, per night (1-3 hrs)	3 credits
Relevant Post-Secondary Education	Completion of full semester	40 credits
	Successful pass mark on exam	10 credits
	(combined max per course = 50 credits)	
Development/Presentations of Seminars/courses (First time presentation only)	Complete semester (first time only)	100 credits
	Full day (6+ hrs)	30 credits
	Half day (3-6 hrs)	15 credits
	Short (1-3 hrs)	10 credits
	(A semester = min 10 wks)	
APDIO Affirmation exam	Successful pass mark on exam	10 credits
Other	Volunteer with NPO inc. APDIO (per hr)	1 credit
	(max of 30 hrs per 3-year cycle)	

The Association of Professional Accounting & Tax Consultants

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APPENDIX B

Sample CPD Reporting Form

Association of Professional Driving Instructors of Ontario**CPD Reporting Form**

Name: _____

Date	CPD Activity (Course Name, Activity)	CPD Provider (including speaker, sponsoring organization)	Verifiable CPD Credits	CPD Category
Sept 2019	APDIO Fall Seminar Driving Technologies Seminar	APDIO	43	EDU
				EDU
2019	APDIO board & committee member	APDIO	10	VOL
Jan 2019	APDIO update seminar	APDIO	33	EDU
Oct/Nov 2020	APDIO fall Seminar 2013	APDIO	33	EDU
Oct 2020	Breakfast Seminar	APDIO	3	EDU
Jan 2021	APDIO update seminar	APDIO	22	EDU
	NOTE: THE CREDITS SHOWN ABOVE ARE FOR ILLUSTRATION PURPOSES ONLY AND SHOULD NOT BE CONSIDERED INDICATIVE OF ACTUAL CREDITS AWARDED			
		TOTAL	144	

Important Note: All members are required to retain their CPD records including all relevant documentation for a period of three years after the reporting period for possible audit by APDIO Standards Committee.

CPO CATEGORIES

EDU - Attending educational events such as seminars, courses, workshops and webinars

DEV - Development and/or presentation of educational session such as any of those listed above

PUB - Writing and publication of relevant articles for APDIO newsletter, newspapers, magazines or professional journals

VOL - Volunteer service in a leadership capacity on behalf of the APDIO or other NPO or Charity

APPENDIX C

CPD Reporting Form

Association of Professional Driving Instructors of Ontario

CPD Reporting Form

Name:_____

Date	CPD Activity (Course Name, Activity)	CPD Provider (including speaker, sponsoring organization)	Verifiable CPD Credits	CPD Category
		TOTAL		

Important Note: All members are required to retain their CPD records including all relevant documentation for a period of three years after the reporting period for possible audit by APDIO Standards Committee.

CPO CATEGORIES

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APPENDIX D**APDIO CONTINUING PROFESSIONAL DEVELOPMENT****DECLARATION FOR THE {YEAR}**

I, the undersigned, being a member of the APDIO subject to continued professional development, do hereby declare that:

I have met the requirements of the association's standard for Continuing Professional Development (CPD) for the year stated above.

I have received a copy of version 1.2 of the standard which requires my signature on this declaration.

I understand that I am still required to complete, but not submit, the reporting form to track by CPD credits.

I understand that this declaration is to be submitted to the association, instead of the reporting form, at the time of membership renewal.

I acknowledge that as part of the association's CPD audit process I may be asked to submit my reporting form within 30 days of this request.

Signed by: _____

Printed Name: _____

Date: _____