

## General FAQs regarding CPD

I am a member in good standing that has branched into a specialized field that is not directly related to the CGISA qualification. I continue to use a specific set of skills from the CGISA qualification, but are not directly employed or active in the financial services or secretariat industry – what are my CPD requirements?

If you want to retain your membership, you will be expected to complete CPD and meet the 20 hours requirement. It does not matter in what field you operate; the assurance the Institute conveys to the public is that if you deal with a Chartered Secretary, then you can expect a business relationship that is based on integrity, accountability and updated knowledge and competency. Thus a Chartered Secretary, who runs a hardware business or a bakery, is still expected to develop a CPD programme that develops the knowledge and skills that lead towards better business proprietorship – in that field.

If I attend CPD seminars at other professional bodies, will it count towards my CGISA CPD hours?

Yes it will count. The number of hours is calculated on the length of the event. CGISA will accept hours logged at seminars conducted by other professional bodies. For example an event which runs from 8h00 to 10h00 will give you 2 verifiable hours.

I belong to another professional body – will the professional development requirements that I fulfil for that body meet the CGISA requirements?

If the CPD that you fulfil for that body satisfies your own personal development needs, then that will suffice and you will be compliant with the Chartered Governance Institute of Southern Africa CPD requirements.

Members located in small towns and areas struggle to meet the requirements unless they travel to cities. How can they meet the requirements?

We encourage our members to attend CPD seminars held by other professional bodies. We will regularly circulate information on the seminars held by other professional bodies. There are other means of recording hours, which does NOT involve attending seminars.

I am fully retired – do I still have to do CPD?

If you are retired, you are not required to do CPD.

I am not sure what the difference is between verifiable and non-verifiable CPD?

### Verifiable CPD

Verifiable CPD involves participating in activities such as courses, seminars, workshops, updates, conferences and panel/group meetings where you can **provide evidence** that the learning was relevant to your current or future career needs, and **you can prove that it took place**. You will need to be able to explain why you chose the activity and how it is relevant to you, when the activity took place, what you learned and how you will apply

your learning. Verifiable CPD activities can be objectively verified by a competent source. **Verifiable CPD must make up a minimum of 13 hours per annum.**

A wide range of courses and activities will be suitable for your CPD needs. Courses can be undertaken by face to face tuition, online or via other electronic forms of delivery.

In all circumstances, in order to include learning as verifiable CPD, CGISA requires you to keep a record which clearly shows:

- how the activity is relevant to you
- how many CPD hours you are claiming for the activity
- how you are going to use your learning
- proof that the learning took place.

Verifiable CPD does not have to be about attending courses – an example of verifiable CPD is outlined below:

#### *Writing a business report for your employer*

In order to write a business report, you might need to undertake 4 hours of research on the internet, learning in a subject area that is new to you, or where regulation has changed. You would then write the report. The report is the evidence of your verifiable CPD. It shows that you have applied the learning you acquired. The research you undertook is the learning activity. You will therefore have completed 4 hours of verifiable CPD.

Other ways in which you can pursue verifiable CPD are provided below (please remember that in all of these examples, there must be a learning outcome, i.e. a result of your learning activity):

- Reading technical updates or standards where there is a learning outcome (similar to the example above)
- Writing or giving a presentation *for the first time*
- Using e-learning
- Materials/personal notes from attendance at courses, conferences or seminars
- Attendance certificate from courses or workshops
- Research notes and final copy of technical or business articles
- Notes of participation in discussion groups
- Outputs or products from work, for example a business plan.
  - Course/ training certificates
  - Attendance registers at meetings/ workshops
  - Third party attendance verification
  - Research papers
  - Strategy documents or presentations

Many of the activities that you complete in the workplace can count towards your CPD requirement:

- taking on new tasks, roles or responsibilities offers you an opportunity to develop your skills
- involvement in coaching or mentoring colleagues, or being coached or mentored yourself, will also develop new skills or maintain existing skills
- you may sit on a committee or working party, or be part of an industry group or network (e.g. the Professional Practice Group (PPG)). Note simply being a member does not apply; active participation in such a group is required.
  - completing a piece of work which required you to learn new information can also count as CPD.

CGISA will recognise any of these activities as CPD if they are relevant and contribute to your individual

development and learning needs.

Examples of verifiable CPD	
Activity/Event	Examples
Participation in a structured activity/event either as a delegate, speaker, panel member or other participant	<ul style="list-style-type: none"> <li>• Completing relevant short courses, seminars, or workshops that can be evidenced. These can be organised by CGISA or other providers.</li> <li>• Participation in staff development training courses/activities provided by employers that can be evidenced.</li> <li>• Participation or attendance at relevant conferences, events, displays, updates, specialist panels, groups and specialist panel meetings that can be evidenced. These can be organised by CGISA or other providers.</li> </ul>
Sharing professional knowledge	<ul style="list-style-type: none"> <li>• Writing relevant books, articles and papers</li> <li>• Lecturing, teaching and addressing meetings</li> <li>• Being an examiner or being involved in professional or higher education</li> </ul>

### Non-verifiable CPD

Non-verifiable CPD is a learning activity which has taken place, but doesn't have a defined or specific learning outcome or is difficult to corroborate.

This would include, for example, general research or reading of professional magazines; following financial and business matters in print and media; and discussions with colleagues in an informal setting (for example, learning about developments in business or finance at a social event, or informally through networking at a business event, etc). Non-verifiable CPD involves activities you can undertake yourself. It may be difficult for a third party to evidence this type of CPD so you will need to keep your own records. **Non-verifiable CPD can make up a maximum of 7 hours per annum.**

Examples of non-verifiable CPD	
Activity	Examples
Personal study/research	Reading, researching information via the internet, reviewing books or articles for professional purposes <ul style="list-style-type: none"> <li>• Reading <i>Boardroom</i> magazine.</li> <li>• Reading a publication</li> </ul> Reading other professional body magazines Reading other relevant publications e.g. business journals

### Why did we refine and change the old Chartered Governance Institute of Southern Africa CPD policy?

All professions that operate in the accounting, auditing and corporate governance arenas are under close scrutiny. There are increasing demands that the public interest be protected. A CPD programme that is meaningful and that has teeth, will demonstrate to all employers and clients of Chartered Secretaries that we are committed to the goals of life-long learning, maintaining and developing professional competence and observing strict ethical standards. The Chartered Governance Institute of Southern Africa CPD programme has been developed in discussion with other professional bodies and in terms of our own international guidelines and standards.

### Why the control?

The Chartered Governance Institute of Southern Africa CPD programme is based on trust and the emphasis is on support rather than control or making judgements. The core drivers of this approach are the requirements of each Member to progress according to their own and their employment or practice needs. To what extent you have defined your needs and implemented a programme to achieve your own goals is what is being measured and recorded – rather than the actual events or interventions themselves.

CGISA will not prescribe specific courses, programmes, journals or other forms of learning or training material. Members are free to choose relevant CPD activities based on their identified learning and development needs and CGISA will rely on the professional judgement of members in this regard.

It is, however, not an option to not undergo professional development – then you cannot lay claim to being a professional of any worth in the modern environment.

### When will I need to start recording CPD activity?

CPD is reported annually from January to December. For all new members the CPD cycle commences in the year following registration.

Invoices are issued to members annually, and each invoice includes a returnable statement that needs to declare that you have met the current CPD requirements. If you require assistance, please make use of the services of the Member Administrator.

### How much CPD will I have to do – how many hours will it take on an annual basis?

A minimum of 20 hours is required per annum. Non-verifiable CPD can make up a maximum of 7 hours of the 20 hours per annum.

### What will happen if I don't comply?

In keeping with our aim to be supportive of members in their life-long learning journey, members who have not met the requirements will have their CPD programmes reviewed individually. They will be advised on how to proceed and may be given additional time. If failure to comply persists beyond a specific time-frame, then the Investigations Committee will be called upon to investigate the situation as

a formal complaint.

### What evidence of CPD is required?

The website has templates on this. There is a quick link button on the homepage of our website that will take you to your log in page. Once you have logged into the members area you will be able to record details of your CPD activity to date.

### Will all members have to do CPD?

Yes – all members, irrespective of what field or industry they work or practise in, will need to have a CPD programme that meets their respective developmental needs.

### Will this involve filling in many forms?

Members have two options for maintaining CPD records:

- Members must record CPD activities on the CGISA online system.
- Members need to also provide CGISA with an annual declaration that they are undertaking a CPD programme.
- A randomly selected sample of members will be subject to a verification process conducted annually by CGISA. It is therefore important that members still keep their own records of their learning activities.

Should a disciplinary matter be brought before CGISA where the issue of incompetence arises, the onus will be on the member to prove that they have complied with the CPD policy.