

Level of compliance with CPD disappointing

The level of compliance by FISA members with the continuing professional development (CPD) requirements set out in the CPD charter approved by the FISA Council two years ago is disappointing.

Despite the development of a very user-friendly log for CPD points on the FISA website, capturing has been slow. A very large proportion of members did not capture anything so far, with the only points showing on their profiles those that have been captured by the web administrator on their behalf after their attendance of the 2012, 2013 and 2014 FISA Conferences. This is a very poor reflection on their commitment to upholding professional standards.

FISA introduced CPD as a requirement because it is one of the indicators of professionalism. Keeping up to date with changes in knowledge and learning in a professional environment is essential to continued ability to act in the best interests of clients.

Almost all professions in South Africa have some form of CPD requirement in place as a pre-requisite to continued membership of the profession. In the absence of CPD, there is no mechanism to evaluate whether the individual has progressed on the path of professionalism or remained stuck at the qualification level and time.

The FISA CPD programme requires 60 hours of professional development in a moving two year cycle, at one CPD point per hour spent. The current cycle ends on 31 December 2015. After that, the FISA Council will engage with members who did not comply with the requirements.

The programme requires that 40 out of the 60 points must be verifiable (e.g. attendance of CPD events, registration for courses, examinations, webinars, etc.), while the other 20 points can be made up with reading and self-study.

A further requirement is that 40 out of the 60 points must be in the areas of expertise where the member spends the most professional time. These areas include estate planning, wills consultation and drafting, deceased estate administration, trust administration, and beneficiary fund administration.

Ethics must be the focus of 5 out of the 60 points.

FISA members are free to attend CPD events offered by other bodies, universities or other educational providers and record the points on their profiles on the FISA website. The only requirement is that the contents of such events or courses must be applicable to the fiduciary field.

FISA will also no longer capture CPD points for those members who attend the conference. As some attendees do not stay for the whole programme, FISA cannot vouch for the number of hours that an attendee actually spent attending the conference.

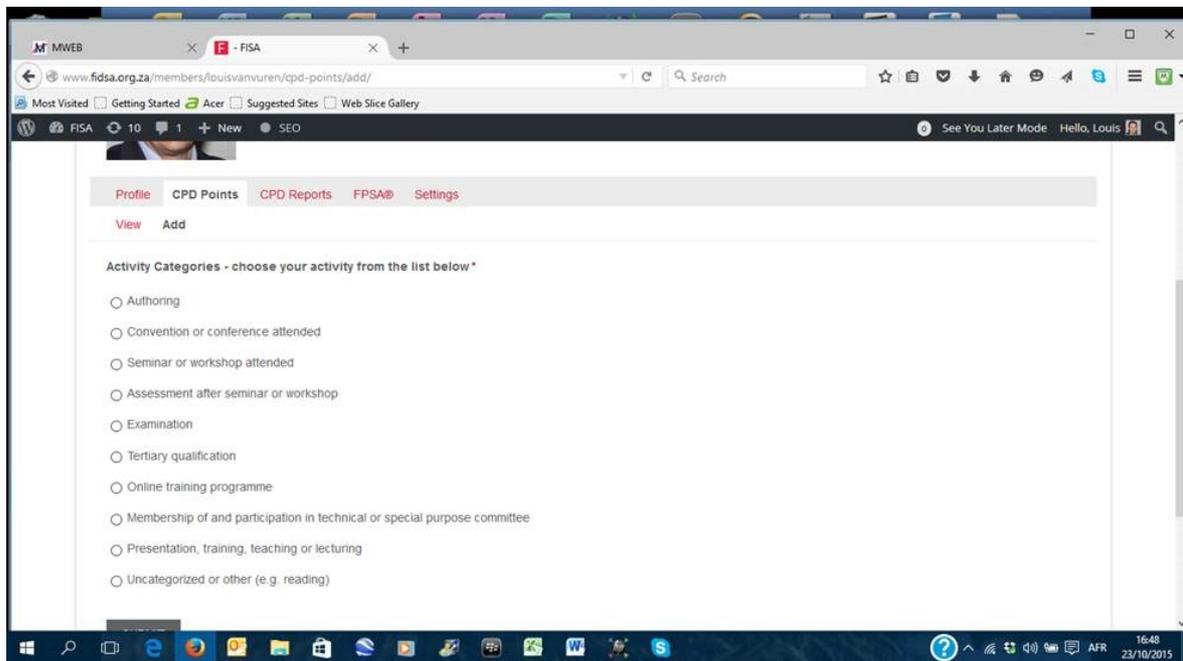
To capture CPD points on the personal log on the FISA website is very simple and user-friendly.

STEP 1 – Log into your personal profile on the website. If you have forgotten your logon credentials, a process is available to obtain these.

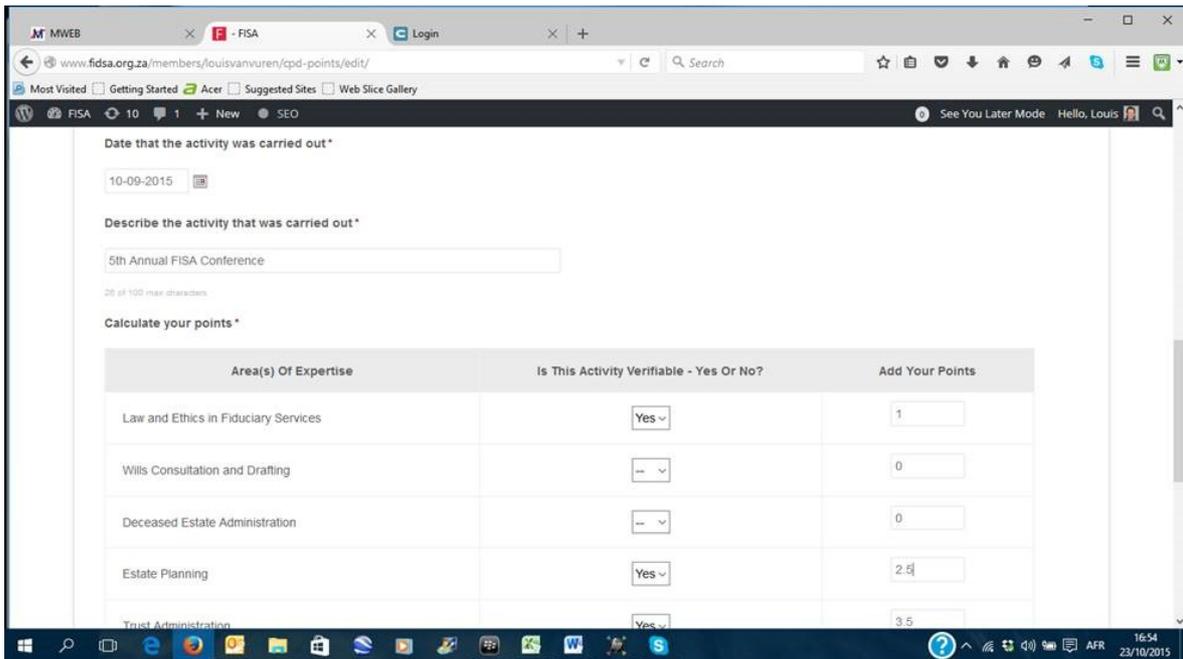
STEP 2 – Click on “My Account” under the welcome message in the top right hand corner of the page.

STEP 3 – Click on the “CPD Points” tab just below your picture (or the space for it if you have not yet uploaded a picture).

STEP 4 – Click on the “Add” tab, then click on the button best describing the CPD activity you want to capture. Then click on the little calendar button to choose the date of the activity, then type in a short description of the activity or event.



STEP 5 – Scroll down and choose the area of expertise, in the column to the right of the area description click to indicate whether the activity is verifiable or not, and in the column to the right of that enter the number of hours spent (e.g. for one and a half hour, capture 1.5). It is possible to split the same event or activity between more than one area of expertise.



STEP 6 – Scroll down and click the “SUBMIT” button.

You will be returned to the “View” screen where a summary of the points you have just captured is presented to you.

That is capturing CPD points in six easy steps!

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