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# Chartered Director

Continuing Professional Development (CPD) Guide 2018

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# Your guide to the IoD's standards for continuing professional development

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## Introduction

Continuing professional development (CPD) is a lifelong process of recognising, recording and reflecting on learning experiences and outcomes. CPD allows practising directors to update their skills and knowledge and to keep abreast of changes to ensure they remain effective as directors and as board members.

As a condition of your continued registration as a Chartered Director, you must undertake and maintain a record of CPD. The institute's Code of Professional Conduct requires that Chartered Directors should:

- **Keep abreast of both practical and theoretical developments in direction to ensure their expertise is constantly relevant**
- **Undertake a minimum of 30 hours CPD per year. The number of hours is given for guidance purposes; most Chartered Directors will exceed this requirement.**
- **Structure a development plan and devote time to activities that will generate benefit. Taking a structured approach to making decisions about what you need to learn and how that learning should be undertaken requires some forethought. Drafting a professional development plan will provide a basis for your activities and can be used to track your progress.**
- **Keep a detailed record of their CPD, and be able to provide it to the IoD on request. As part of the auditing process, further details may be requested.**

## CPD activities

In broad terms, anything that adds to your knowledge and skills and is relevant to your role as a director is considered CPD.

Chartered Directors have a wide spectrum of learning needs as they are employed in a broad range of sectors and come from varied backgrounds. There are no limitations to the range of subjects that can be counted as CPD, provided the activities relate to your role as a director.

**The list below provides examples of CPD activities but is not definitive:**

- **Conference attendance**
- **Formal education, lectures, seminars, courses**
- **Giving presentations**
- **Coaching or mentoring**
- **Committee membership**
- **E learning CPD Modules**
- **Training**
- **Peer support groups**
- **Reading**
- **Workshops**
- **Writing articles or papers**
- **Voluntary work e.g. school governor, trustee**
- **Management of club or society**
- **Lecturing**
- **Updating your knowledge through TV, radio, internet**

**Information on the IoD's CPD offering can be found at <https://www.iod.com/training/cpd-workshops>**

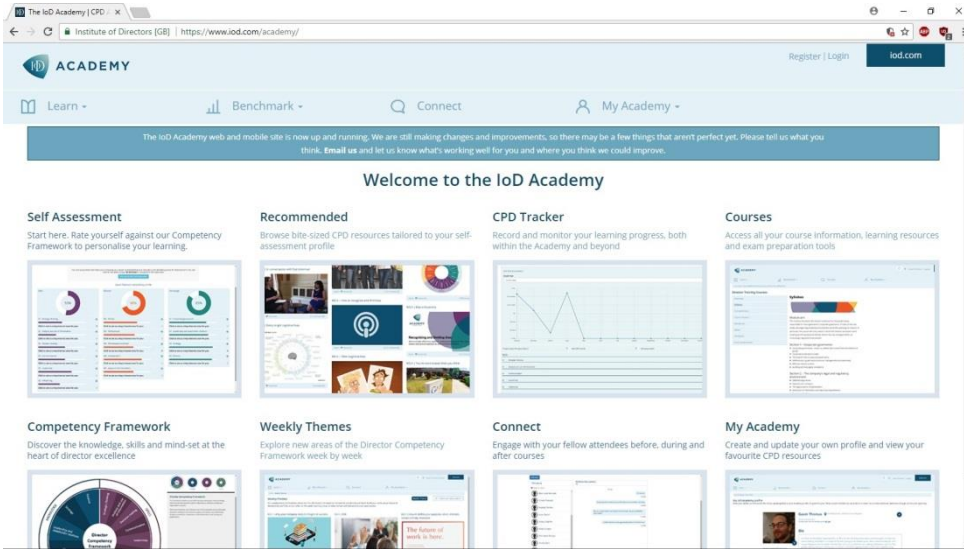
## Planning your CPD

Planning your CPD starts by making an assessment of your current situation and determining your own individual learning and development needs. Completing the competency self-assessment tool which is based on the IoD Director's Competency Framework could help you to form the basis of this plan. <https://www.iod.com/academy/benchmarking/self-assessment-return>

# Recording CPD

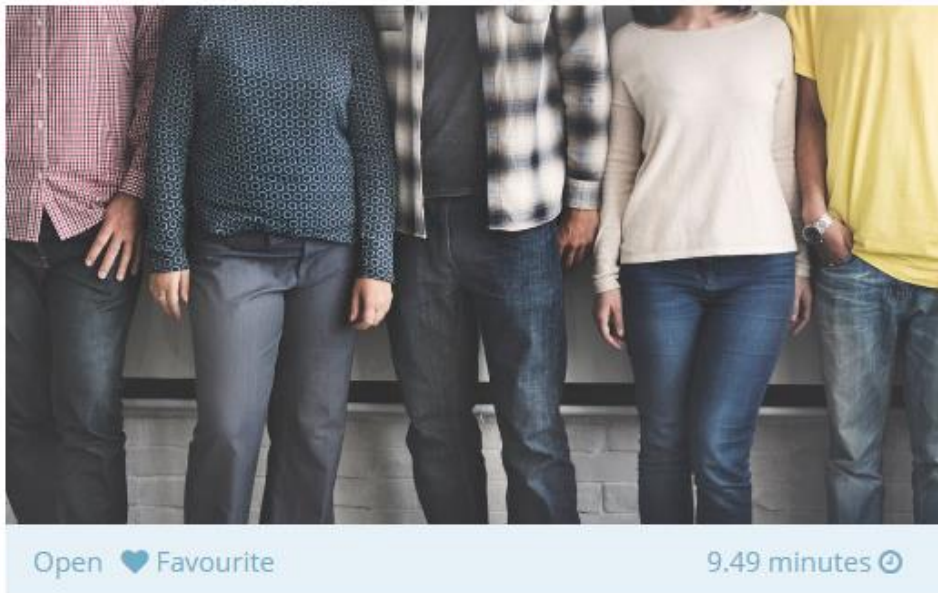
Here is a step-by-step guide to recording your CPD using the IoD Academy CPD Tracker. If you have any questions, please email [academy.support@iod.com](mailto:academy.support@iod.com).

- 1) Go to [www.iod.com/academy](http://www.iod.com/academy) and click the 'Login' button at the top-right of the screen. Enter your username and password then click the 'Login' button. There's a 'Forgotten password' button below if you need to reset your password.



- 2) The CPD content that you watch, read and listen to in the Learn section will automatically be tracked for you. You can see how much CPD time each piece of content is worth at the bottom-right of each preview image.

## M5.4 | Some of my best friends are directors



- 3) Open the CPD Tracker from the Benchmark section. This is where you can track your CPD activity. The graph at the top of the screen shows you how much time you have spent learning, and you can click the points to see your CPD activity each week.



- 4) Further down the page you will see the CPD activities that you have logged, each categorised into Knowledge, Skills and Mindset – the three pillars of the Director Competency Framework. Click the '+' buttons to explore the activities you have logged.

Skills

S1 Strategic thinking	+
S2 Analysis and use of information	+
S4 Communication	+
S5 Leadership	
S6 Influencing	
S3 Decision-making	

Mindset

M5 Aware of self and others	
M4 Independent	
M3 Performance oriented	
M2 Professional	+
M1 Ethical	

Knowledge

K4 Finance		
K3 Strategy	-	
Brexit paper	1hr	01/05/2018
K2 Leadership and stakeholder relations		

- 5) You can find My Goals and My Reflections at the bottom of the page. Use the Goals area to define targets for your continual professional development. The Reflections area can be used to review the reflections you have made on individual CPD items, and to add a general reflection on your CPD activity each month.

**My CPD goals**

Attend courses for Non-Executive Directors  
 Complete finance training programme  
 Achieve 30 hours of continual professional development  
 Track CPD activity and log my reflections  
 Become a Chartered Director

**Save**

**My Reflections**

Jan Feb Mar Apr **May** Jun Jul Aug Sept Oct Nov Dec

**Reflection** Monthly Reflection

CPD NAME	Minutes	Date	Competency
Animation   How to interpret a cash flow statement	2	01/05/2018	
<b>Reflection</b>			
Defining goals	20	09/05/2018	S5 - Leadership
<b>Reflection</b>	Need to consolidate leadership skills and establish new governance procedures in line with best practice. Complete finance training programme.		

- 6) Click the 'Add CPD Activity' button, which is just below the graph. You will see a list of all the CPD posts you have viewed recently. Click the tickbox beside each post that you want to log as CPD activity, then click the 'Save' button to add it to your tracker.

**CPD Activity**

**Log read content** Add CPD Manually

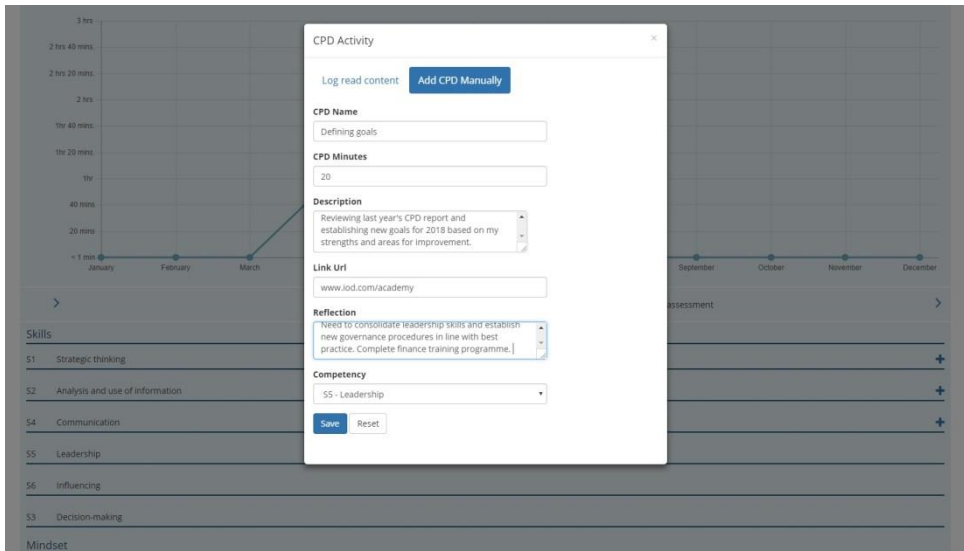
Please select from the below content you have read on ioD Academy to log in your CPD record.

CPD Name	CPD Time
<input checked="" type="checkbox"/> MS.4   Some of my best friends are directors	9 mins
<input checked="" type="checkbox"/> MS.4   When women sign off emails as men, doors open, it's like magic!	8 mins
<input checked="" type="checkbox"/> MS.4   Every single cognitive bias	5 mins
<input type="checkbox"/> S1.1   Competency focus	3 mins
<input checked="" type="checkbox"/> MS.4   Race in the workplace	20 mins
<input type="checkbox"/> MS.4   Poll	< 1 min
<input checked="" type="checkbox"/> MS.4   In conversation with Sue Unerman	22 mins
<input type="checkbox"/> K3.1   Quiz	2 mins

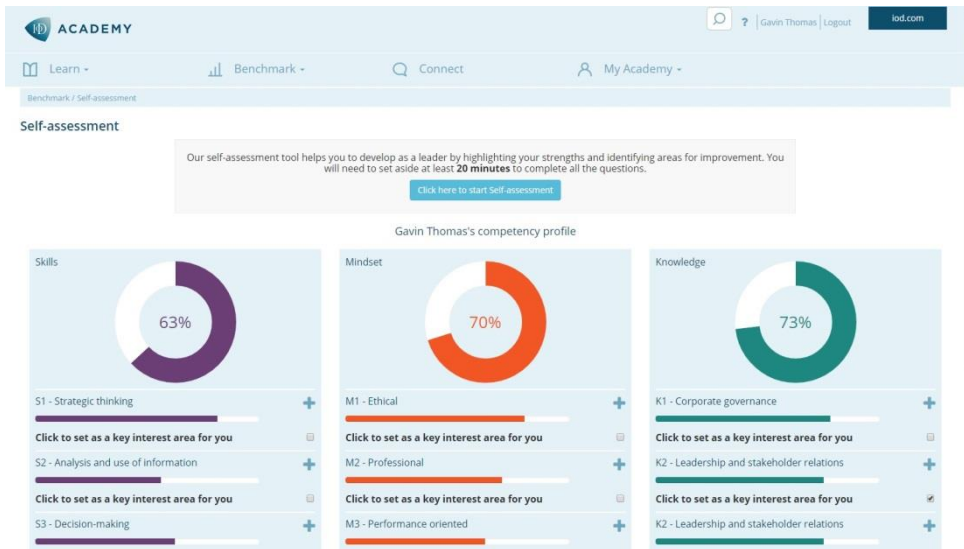
Show More

**Save** **Reset**

- 7) To add CPD activity that you have done outside the IoD Academy, and to add reflections and expand on CPD activities you captured in the previous step, click the 'Add CPD Manually' button at the top. Add your CPD information and then click 'Save'.



- 8) Remember to use the Self Assessment Tool to help define your strengths and areas for improvement, so that you can focus your CPD tracking on the director competencies. There's a link to the Self Assessment Tool just below the CPD Tracker graph.



Note: If the CPD Tracker is stuck on the loading icon after you manually add a CPD activity, please refresh the page.

## Frequently asked questions

### 1. What is a CPD year?

The CPD year for all Chartered Directors is January - December. Those who are newly qualified will have a pro rata requirement.

### 2. Are there any exceptions to fulfilling the CPD requirements?

You will be exempt from the compulsory CPD requirement if:

- you are unable to meet the formal CPD requirement due to ill health or disability;
- you are on secondment, a career break or currently unemployed for up to two years. CPD undertaken 'informally' will ensure that you stay up to date. We will seek a commitment from you that, on return to formal employment, you will resume CPD activities;
- you are officially retired (see IoD membership regulations) and are undertaking no paid work.

In all such circumstances you should notify us at [chartered.director@iod.com](mailto:chartered.director@iod.com).

**As far as possible, you are encouraged to keep up to date with developments that are central to your interests through reading the Institute's publications and keeping abreast of developments within your sector.**

### 3. How many hours should I aim for each CPD year?

The IoD recommends that you undertake at least 30 hours CPD per year as a minimum in order to keep up to date and respond competently to changes in the business environment, organisational requirements and legislation.

### 4. What happens if I do not comply with the CPD requirements?

In these circumstances we would want to talk to you and understand why you had not managed, or did not want, to maintain your CPD requirement.

Generally speaking, you will be in breach of the IoD Code of Professional Conduct and thus potentially subject to the Institute's disciplinary procedures if you do not comply. In understanding your circumstances, the IoD may be able to offer you a solution to your current situation. If you do not comply without good reason, the IoD's reporting procedures will apply and the Accreditation and Standards Committee will decide on the appropriate course of action.

### 5. When should I start creating a CPD log?

The requirement for undertaking CPD and maintaining a record starts when you become qualified as a Chartered Director.

### 6. Do I have to use the IoD's CPD tracking tool?

No, you can use any method you wish to record your CPD. If you choose to record your CPD outside of the IoD Academy and you are asked by the IoD to provide your CPD record, however, you will need to supply it in full, as the IoD cannot access externally held records. If you record your CPD via another institute or 3rd party scheme you can use this as your CPD record.

### 7. Should I submit my record to the IoD automatically at the end of the year?

No. You only need to submit your record if you are selected as part of the IoD's yearly CPD audit. Typically we will randomly sample 10% of Chartered Director CPD records each year.



**8. What happens if I am selected for audit?**

If you are picked up in the annual selection process, you will be asked to submit a copy of your CPD record. The record will need to show the activities you have undertaken, the time you have recorded against each activity and a reflection of the outcomes achieved against each activity.

**9. Is there anything that does not constitute CPD?**

Any CPD activity should be planned wherever possible and be relevant to your role. Any activity that does not have a clear learning objective that relates to your role and specialism cannot be considered as appropriate CPD.

Activities such as social events, networking or involvement on boards, committees or clubs that have little or no relevance to your professional role will not count towards your CPD requirements.

**10. How do I calculate the amount of CPD hours spent on an activity?**

You should only log the time spent on the learning activity itself, e.g. if you attend a conference you should log only the time spent in an activity that addresses your identified development needs. You should exclude the time taken for tea/coffee breaks, lunch and any social activities around such events.

