



Continuing Professional Development (CPD) Policy

Purpose:

This policy provides members with the requirements and parameters to fulfill their annual Continuing Professional Development (CPD) obligations.

Scope:

This policy shall only apply when a member has attained the Apprentice, Technician, or Certified Professional Bookkeeper (CPB) level. At this time, the member is assigned an Annual Maintenance Period (AMP). The AMP for each member begins the month and day the member attained the applicable level and runs the subsequent twelve (12) months. Annual CPD requirements and the AMP restart on this same date each year.

What Is Considered CPD – Members should plan and select for CPD that is diverse, consisting of activities that develop and maintain technical competencies, including enabling competencies such as leadership, professional and ethical behaviour, communication, and must;

- Be relevant to your professional responsibilities and competencies.
- Be quantifiable; it must be expressed in terms of a specific time requirement.
- Contain significant intellectual or practical content.
- Be delivered by entities such as CPB Canada, CPA Canada, NPI (National Payroll Institute), colleges, universities, government agencies, independent and reputable trainers, accounting technology providers, etc.

What Is NOT Considered CPD (ProD) – Networking hours (social functions, breakfast, lunch, dinner, etc.) generally do not count as CPD unless it can be demonstrated that there was relevant professional development or learning involved.



Policy:

This policy requires the applicable members to fulfill the following verifiable CPD hours (units). Excess CPD of one AMP cannot be carried over to the next AMP;

Minimum Requirement	Apprentice	Technician	CPB*
CPD units per AMP	5	10	20
Categories			
Professional Development (ProD)			
Professional Ethics (PE)	1	1	1
Technical & Business Competencies (TBC)	4	9	15-19
Presenting & Speaking (PS) (maximum)	0	0	2
Personal Development (PerD)			
Including Community Involvement (CI) (maximum)	0	0	2
Mandatory	Optional		

* Approved Retired category members' Minimum Requirement reduced by 50%.

CPD Leaves – Members unable to fulfill their CPD requirements can request an extension or an exemption due to certain circumstances, including;

- A severe medical diagnosis of self or that of an immediate family member
- Maternity, paternity, parental, or family care
- Unemployment

Members whose ability to earn a livelihood has been significantly disrupted or impaired, not meeting the criteria above and/or considering the context of the CPB Canada Hardship Policy, can seek a reduction in CPD requirements at the discretion of CPB Canada. A letter justifying an exemption is required.



Compliance – At any time, random audits of CPD will be conducted to ensure members comply with their CPD requirements. In the event of an audit, a member will have their CPD reviewed and may be contacted to provide further evidence of CPD activities, including verifiable documentation. Member’s records should be kept for three (3) years in the event you are chosen for an audit.

Members found to be non-compliant will have ninety (90) days to become or may face their certification pathway level and any designation and digital credentials revoked.



GUIDANCE TO CPD REQUIREMENTS



Professional Development (ProD)

Professional Ethics (PE) - Professional Ethics is the study of the values that guide the choices and behaviours of professionals. Ethics training ensures that professionals acquire the tools, methods, and frameworks that enable them to make decisions based on ethical principles. Professional Ethics CPD can cover a wide range of topics and should be relevant to a member's responsibilities and competencies.

Examples of Professional Ethics topics include, but are not limited to, the following;

- Independence/conflict of interest
- Ethical business culture
- Corporate social responsibility
- Whistleblowing
- Anti-money-laundering
- Bribery and corruption, etc.

Technical & Business Competencies (TBC) – Examples of Technical & Business Competencies topics include, but are not limited to, the following;

- Accounting/bookkeeping technical competencies/fundamentals
- Business workflows, processes, and pricing
- Accounting/bookkeeping technology
- Employment standards
- Marketing, social media

Presenting & Speaking (PS) – Examples of Presenting & Speaking activities include, but are not limited to, the following;

- Serving as a speaker or instructor for courses and presentations
- Serving as a moderator of a relevant discussion
- Serving as a subject matter expert for a panel discussion
- Presenting a webinar, workshop, session, or podcast

Personal Development (PerD) – Examples of Personal Development activities include, but are not limited to, the following;

- Physical and mental health activities
 - Gym and/or yoga studio membership, personal training



- Mindfulness and/or meditation initiatives
- Business networking meetings
 - Chambers of Commerce
 - Business Network International (BNI)

Community Involvement (CI) – Examples of Community Involvement activities include, but are not limited to, the following;

- Providing volunteer, non-compensated services to non-employer/non-client groups
- Active participation in a profession/community organization, i.e., serving on a Board of Directors, committee, or advisory group



Verifiable Hours – CPD activities can be obtained through professional development/educational courses, conferences, seminars, symposiums, webinars, workshops, regional network meetings, etc. Examples of documentation that would support verifiable hours can be one of the following, as appropriate;

Document	ProD		PerD	
	PE & TBC	PS		CI
A copy of a course payment or invoice	✓		✓	
A certificate of completion or official transcript	✓		✓	
Confirmation of participation by a provider or employer	✓		✓	
An attendance record (i.e., a sign-in sheet)	✓		✓	
Course or exam results, confirmation of designation or certification	✓		✓	
A copy of a course or presentation material from the session, including the date and speaker details		✓		
A letter on letterhead, signed by someone in a position of authority within the organization, stating hours worked and duties performed				✓
An award given from an organization in recognition of their contribution (image of award, copy of a certificate, or letter received acknowledging the award)				✓
Proof of position held within an organization (e.g., a copy of a public listing of directors of a board)				✓

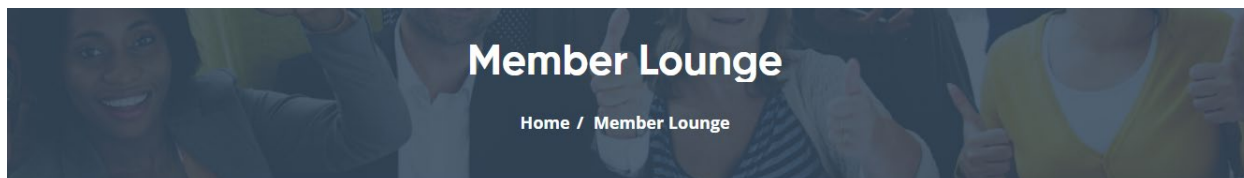
Self-directed CPD activities, i.e., reading, podcasts, videos, etc., would not be considered verifiable unless evidence of attendance or completion is provided.



Tracking

You should track the details of your CPD activities using your preferred method.

While not mandatory, two components of your “Member Lounge” may be helpful. The “Submit CPD Units” page/form submissions populate your CPD activities to your “My Certification Progress (Maintenance)” tracker, a point-in-time snapshot of your compliance progress. Live CPD activities registered and attended with CPB Canada automatically augment the tracker unless otherwise advised.



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Haven't Met Your CPD Requirements?

Members in non-compliance by falling short of fulfilling their CPD requirements at the end of their AMP or from the outcome of being selected for a CPD audit must remedy their situation within ninety (90) days of being requested.

If choosing to use your Member Lounge CPD tracking capabilities noted above, members have the following options within the ninety (90) day period;

1. You can record CPD already attained during your AMP but not yet submitted. Be sure to submit for the "Completed Date" of the CPD activity that fell within your AMP.
2. You can obtain the necessary CPD. Be sure to submit and backdate the "Completed Date" for a date near the end of your AMP.

Failing the above members may face their certification pathway level and any designation and digital credentials revoked.