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# A Guide to the CMC-Canada Continuing Professional Development (CPD) Program

Issued by the CMC-Canada National Certification Committee

Effective July 1, 2009

This version cancels and replaces the September 2008 version.

## **1.0 Introduction**

As members of a self-regulated profession, Certified Management Consultants have a professional obligation to define, establish and maintain their required competencies. In many jurisdictions in Canada this obligation is specified in an Institute's governing statutes.

This Guide and other referenced documents are intended to articulate to Canada's Certified Management Consultants the requirements of the national Continuing Professional Development (CPD) program and to provide a framework to plan, implement and report on their continuing professional development activities.

Certified members are also encouraged to consult their Institute's Act, By-Laws, Codes of Conduct or other sources for any additional requirements.

The presence of a national program is intended to 1) provide consistency amongst members, 2) provide confidence to the public that a minimum standard exists and that it is being met, 3) ensure that CMC-Canada is consistent with its sister organizations around the world.

Professional development is an ongoing process of systematically 1) defining your needed competencies, 2) planning how those competencies will be attained and maintained, and 3) implementing your plan.

As we move through our professional careers our interests, opportunities and requirements change and the professional development process allows us to continually maintain the established standard.

In practice, competency is developed through education, training, study and experience and is demonstrated by the application of knowledge, abilities, skills and attitudes in the delivery of items, outcomes or results consistent with an established standard.

## **2.0 Annual Requirements**

### **2.1 Establish and Maintain a Plan**

Development and maintenance of a professional development plan involves 1) describing your current or desired scope of practice and the items, outcomes or results you are required to produce, 2) understanding your responsibilities to colleagues, clients, subordinates, your employer, the public and other stakeholders, 3) defining the knowledge, abilities, skills, and attitudes required for your current or future work, 4) identifying any current competency gaps or any gaps that could form in the absence of any professional development activity.

CMC-Canada has developed a Certified Management Consultant Competency Framework Summary document that defines the basic competencies and associated characteristics expected of Certified Management Consultants. These include, for example, personal, interpersonal and functional competencies. Your job or position description, your organization's competency matrix, or the results of salary surveys may also be sources of information about competency requirements and how they are demonstrated or measured.

Competency gaps may result from new or changed knowledge, introduction of new techniques or technologies, evolving client expectations, regulatory changes or a change in your scope of practice. The state of the art is not static and the standard of performance established by practitioners can and does change. Whether you are a new or a seasoned consultant the need to perform more effectively or efficiently may exist.

We recommended that you document your plan by listing in as much detail as possible what activities will be undertaken throughout the calendar year and the anticipated CPD points.

Certified members are required to attain 35 CPD points per year. Eligible activities are grouped into categories and each category has a maximum for reporting purposes. For example, category C1, *Participation in Seminars, Workshops, Courses, Conferences, Presentations*, has a maximum of 25 points per year.

Having a documented plan also allows you and your organization to identify and budget time and funds for suitable activities.

We recommend that you review and, if necessary, revise, your plan at least annually.

## **2.2 Implement Your Professional Development Plan**

Implementing your plan involves undertaking the planned activities. If some elements of the plan were initially stated in general terms (e.g., develop project risk management skills) implementation may involve identifying and selecting from options (e.g., attend a course, find a mentor, volunteer to assist with a complex community event).

Throughout the year, refer to your plan to determine if you are on track to meet your target and adjust the plan as required. Some of your planned activities may not be achievable while other opportunities may emerge that still allow you to fulfill your plan.

### **2.3 Establish and Maintain Records**

Records allow you to monitor and track to what extent your plan has been achieved and form the basis for reporting your professional development points. Table 1 specifies what information about an activity should be recorded.

### **2.4 Report CPD Points**

The CMC-Canada CPD program requires that certified members annually report their CPD points on a calendar year basis. A CPD Declaration form is sent to members with the annual membership renewal documents and certified members are asked to enter their total number of CPD points and then submit the form to CMC-Canada.

## **3.0 Annual CPD Program Review**

One element of the CMC-Canada CPD program is an annual review. The purpose of the review is to 1) determine the level of compliance with program requirements, 2) identify any aspects of the program that are not understood, 3) identify professional development needs, 4) assist certified members maintain their competencies.

The annual review includes selecting a sample of certified members and reviewing their supporting records. The results of this review are used to characterize, for example, the level of participation in the program and the types of activities members are undertaking. The review process also provides an opportunity to clarify aspects of the program.

## **4.0 Eligible Activities**

Chances are you already participate in activities that are eligible CPD activities. In general, activities that increase your knowledge and understanding, improve or extend your skills, or maintain or enhance your abilities are eligible under the CMC-Canada CPD program.

However, although many activities may qualify as professional development activities, your activities should support achievement of your professional development plan. Attending a course or a conference that is irrelevant to your current or emerging scope of practice, for example, should be avoided.

Professional development activities may occur during work hours and may be paid for by you or your organization. Eligible professional development activities also include volunteer work that allows you to apply or develop your professional competencies.

Table 1, Eligible Activities and Points, defines the CPD categories, describes typical activities and specifies how points are applied.

## **5.0 Frequently Asked Questions**

A list of questions and answers about the eligibility of activities has been compiled in a frequently asked questions (FAQ) document, available on the CMC-Canada website ([www.cmc-canada.ca](http://www.cmc-canada.ca))

CMC-Canada members are encouraged to submit questions to the National Certification Committee c/o Manager, Certification at [certification@cmc-canada.ca](mailto:certification@cmc-canada.ca)  
Questions and responses will be added to the FAQ document.

**Table 1**  
**Eligible Activities and Points**

<b>Eligible Activities</b>	<b>Points and Maximums</b>
<b>Participation in Seminars, Workshops, Courses, Conferences, Presentations</b>	
<p><b>A1</b> Facilitated and/or structured learning and development activities that either enhance 1) functional or sectoral competencies, 2) consulting skills and abilities, or 3) understanding of relevant work-related emerging issues. <b>Examples include:</b></p> <ul style="list-style-type: none"> <li>• Accredited and non-accredited in-person, distance learning and e-learning seminars, workshops and courses offered by universities, community colleges, technical institutes, professional and industry organizations and societies.</li> <li>• The learning and development portion of luncheon and dinner meetings organized by professional, technical, managerial, industry or business organizations.</li> </ul> <p>→ Your certificate of completion, registration confirmation, payment receipt, notice of event or other supporting information should be kept as a CPD record.</p>	<p>½ point per half hour of attendance.</p> <p>Maximum of 25 points per year.</p>
<b>Total for category A1:</b>	
<b>Development and/or Delivery of Presentations, Workshops, Seminars, Courses</b>	
<p><b>B1</b> Activities outside of or not related to paid research, consultancy, education or training. <b>Examples include:</b></p> <ul style="list-style-type: none"> <li>• A workshop for a CMC-Canada national conference.</li> <li>• A two-hour PD session for a local CMC-Canada chapter.</li> <li>• A presentation to a local university class about consulting.</li> <li>• Facilitate/Teach/Deliver a CMC-Canada seminar or course.</li> <li>• Facilitate/Teach/Deliver a course or seminar on behalf of another technical or professional body, e.g., PMI, APEGA</li> </ul> <p>→ Record the type of activity, subject, date(s) and duration.</p>	<p>½ point per half hour of preparation or delivery.</p> <p>Maximum of 15 points per year.</p>
<b>Total for category B1:</b>	
<b>CMC-Canada and CMC Institute Involvement</b>	
<p><b>C1</b> Participation in/on 1) the National Board or a National Committee, 2) the Council, a Committee or a Sub-Committee of a CMC Institute, 3) National and Institute programs and events. <b>Examples include:</b></p> <ul style="list-style-type: none"> <li>• Participation on a professional conduct or discipline committee.</li> <li>• Sponsor of a prospective CMC.</li> <li>• Volunteer maintenance of an Institute web site.</li> <li>• Volunteering for National or Institute sponsored events.</li> <li>• Participating in local chapter events, e.g., CMC awards, AGM</li> <li>• Attendance at the National Annual Conference</li> </ul> <p>→ Record the meeting or event name, date(s), your role and duration.</p>	<p>1 point per hour.</p> <p>Category maximum of 20 points per year.</p> <p>Activity maximum of 5 points per year.</p>
<p><b>C2</b> CMC-Canada Oral Assessor Training and Delivery</p> <ul style="list-style-type: none"> <li>• Includes preparation for and delivery of oral assessor training</li> <li>• Includes receipt of oral assessor training</li> <li>• Includes preparation for and participation as an oral assessor</li> </ul> <p>→ Record your role, date(s) and duration.</p>	<p>1 point per hour.</p> <p>Category maximum of 20 points per year.</p> <p>Activity maximum of 10 points per year.</p>

<p>C3 Participation as a mentor in a CMC Institute run mentorship program</p> <ul style="list-style-type: none"> <li>• Mentor to a prospective CMC (mentee)</li> <li>• Includes attendance at a preparation session</li> </ul> <p>→ Record your role, date(s) and duration.</p>	<p>1 point per hour.</p> <p>Category maximum of 20 points per year.</p> <p>Activity maximum of 15 points per year.</p>
<b>Total for category C1-3:</b>	
<b>Involvement With Community and Other Organizations</b>	
<p>D1 Participation in/on a board or committee of a community, not for profit, charitable organization or event or other professional or technical organizations that allows a CMC to apply or develop their competencies in a non-work related environment and to demonstrate professional conduct. <b>Examples include:</b></p> <ul style="list-style-type: none"> <li>• Treasurer of the local Project Management Institute chapter.</li> <li>• Chair of the local United Way campaign.</li> <li>• Volunteer board member of a long-term care home.</li> <li>• Returning officer for a municipal or provincial election.</li> </ul> <p>→ Record the organization or event name, date(s) of involvement, your role and duration.</p>	<p>1 point per hour.</p> <p>Maximum 10 points per year</p>
<b>Total for category D1:</b>	
<b>Other Activities</b>	
<p>E1 Self-structured and/or self-directed study or learning that enhances 1) functional or sectoral competencies, 2) consulting skills and abilities, or 3) understanding of emerging work-related and societal issues. <b>Examples include:</b></p> <ul style="list-style-type: none"> <li>• Identification and study of printed works (e.g., journals, papers, books, manuals, articles)</li> <li>• Search for and study of on-line information</li> <li>• Audio or video materials</li> </ul> <p>→ Record the title, author, subject of the material and duration.</p>	<p>1 point per hour.</p> <p>Maximum 10 points per year.</p>
<p>E2 Writing and Publishing</p> <ul style="list-style-type: none"> <li>• Writing and publication of articles in professional publications (printed journals or e-journals)</li> </ul> <hr/> <ul style="list-style-type: none"> <li>• Author / co-author of published book or original manuscript related to consulting or consulting area of specialty.</li> </ul> <p>→ Record the title, topic, publisher and duration.</p>	<p>5 points per article. Maximum 10 points per year.</p> <p>1 point per hour invested to maximum of 75, claimable in year of publication.</p>
<b>Total for category E1-2:</b>	
<b>Professional Practice</b>	
<p>F1 Active professional practice is considered to be a significant factor contributing to maintaining and improving competencies.</p> <p>→ Record what competencies have been extended or enhanced.</p>	<p>1 point per every 100 hours of professional practice.</p> <p>Maximum of 10 points per year.</p>
<b>Total for category F1:</b>	
<p style="text-align: center;"><b>I HAVE ACHIEVED THE FOLLOWING NUMBER OF CPD POINTS FOR 20__:</b></p> <p>Return your Declaration by fax 416-860-1535 or by email <a href="mailto:membership@cmc-canada.ca">membership@cmc-canada.ca</a>, or complete the online form at <a href="http://www.cmc-canada.ca/cmccacdesignation/earnthecmc/maintainthecmc">http://www.cmc-canada.ca/cmccacdesignation/earnthecmc/maintainthecmc</a></p>	

