



Becoming a Provider of CISI Endorsed CPD Activities

Guidance on applying for approval

Introduction

Thank you for your interest in becoming a provider of CISI Endorsed CPD Activities. This guide contains all the information you need to know about how to become a provider of CISI Endorsed CPD Activities and our approval criteria.

1. How to apply to become a provider of CISI Endorsed CPD Activities

To apply to become a provider of CISI Endorsed CPD Activities you need to:

- Send the completed Account Creation and Application forms to endorsed@cisi.org
- Select the relevant fee option and pay the fee (see Application Form for payment options)
- Send a completed activity form and supporting CPD activity materials (see section 3) for each activity through to endorsed@cisi.org

The packages we have available are:

£1000 One Activity Payment (Includes Annual Fee) then £250 Per Endorsed CPD Credit

OR

£1750 Endorsement for Up To 5 Endorsed CPD Credits (Includes Annual Fee)

OR

£2500 Endorsement for Up To 10 Endorsed CPD Credits (Includes Annual Fee)

OR

£5000 Endorsement for Up To 25 Endorsed CPD Credits (Includes Annual Fee)

OR

£8750 Endorsement for Up To 50 Endorsed CPD Credits (Includes Annual Fee)

One Endorsed CPD Credit is equal to one activity or piece of learning up to 90 minutes, for activities longer than this please refer to the Relationship Manager (Endorsed CPD).

We aim to process applications within five working days and will notify you of our decision. If your application is not approved, you will be advised of the reason why.

If your application is approved, your status as a provider of CISI Endorsed CPD Activities will last for 1 year from the date of approval and will be renewable annually thereafter. We will write to you about the renewal one month before your renewal date.

2. How to apply for specific CPD activities to be endorsed

Once you have been accepted as a provider of CISI Endorsed CPD Activities, you can apply for the accreditation of further CPD activities by:

- Sending a completed Application Form and the CPD activity materials (see section 3) for each CPD activity for which endorsement is sought to endorsedcpd@cisi.org

and

- Paying the endorsement fee (if applicable).

We endorse the content of CPD activities, not their delivery. This means that each Endorsed CPD Activity can be delivered any number of times within the year of approval, without further applications for endorsement being required as long as the content remains the same.

We aim to process applications within five working days and will notify you of our decision. If your application is not approved, you will be advised of the reason why.

Once approved, the activity will be an Endorsed CPD Activity, entitling you to use the CISI CPD logo on the CPD materials and any related marketing materials. You may also state that the activity has been endorsed by CISI for CPD purposes.

Endorsed CPD Activities will be listed on a dedicated page on the CISI website, available to all members.

3. Endorsement Requirements

We only endorse providers who demonstrate their CPD activities meet the following requirements:

3.1 Relevance to CISI members

Your proposed CPD activities must be relevant to our members, helping them to meet the requirements of the CISI CPD scheme.

3.2 Aims and Learning Outcomes

You must state the aims and specific learning outcomes for each CPD activity. This should include:

- The purpose of the activity.
- Who the activity is aimed at, including any prior knowledge required.
- The level of the activity (introductory, intermediate, or advanced). You should determine the level based on your own subject matter expertise.
- The learning outcomes for the activity. Learning outcomes describe what a delegate should be able to know, understand or do as a result of the learning activity.

3.3 Content

The content should meet the aims and stated learning outcomes. All CPD activities:

- Should be generic and educational in nature.
- Should not focus on the Provider's own products/funds or services. If such subject matter is included in the activity, it should be restricted to the end of the activity and limited to the greatest extent practicable.
- Must be up-to-date and factually correct.
- Endorsed CPD must be structured CPD. To be structured CPD, the activity must last for at least thirty minutes and the learning must be verifiable (see section 3.7). CPD activities that meet other requirements but last for less than thirty minutes and are not verifiable will be classed as unstructured CPD and ineligible for endorsement.

Should the endorsed content not meet any of the above content criteria, CISI reserves the right to refuse endorsement until appropriate amendments are made to ensure the contents compliance with this guidance.

3.4 Delivery

The following are some examples of formats for CPD activities which we endorse, however we are always happy to discuss other potential ways of delivering structured CPD:

- Face-to-face workshops, seminars, conferences.
- Live webinars.
- Online – videos, recorded webinars, e-learning.
- Written word – hard or soft copy.

3.5 Tutors or Presenters

All tutors and presenters should be qualified to speak about their subject and must be able to train or present effectively. You will need to send us details about each of your tutors and presenters.

3.6 Materials

All of the materials related to the CPD activity should be submitted for approval, including:

- The aims and learning outcomes and objectives.
- A detailed agenda for the activity (not relevant for written word activities).
- A copy of any PowerPoint slides to be used together with speaker notes (these can be key bullet points).
- A copy of any handouts.
- Access to any online videos, recorded webinars or e-learning programmes.
- A copy of written word activities, such as guides, articles, etc.

It is the Provider's responsibility to ensure that none of their materials infringe copyright.

3.7 Verification

To count as structured CPD, the learning needs to be verifiable. You should provide attendees/users with the means of verification as follows:

CPD Activity	Required Provider Records (to be retained for 2 years)	Suitable Verification Methods
Face-to-face activities	A register of attendees	A CPD attendance certificate or some form of test, either at the event or after the event
Live Webinars	A register of active participants	A CPD participation certificate
E-learning	A register of active users	A record of time spent on the activity or a record of assessment inputs and results, such as test scores
Other online activities	Must include some kind of test, which could be an activity built into the activity, for example, some questions (written or multiple choice) set as an individual or group exercise or online questions that the delegate completes after the event	A record of time spent on the activity or a record of assessment inputs and results, such as test scores
Written Word Activities	Must include some kind of test, which could be an activity built into the activity, for example, some questions (written or multiple choice) set as an individual or group exercise or online questions that the delegate completes after the event	A record of time spent on the activity or a record of assessment inputs and results, such as test scores

3.8 Administration

The Provider must have the necessary processes and procedures in place to support delegates before, during and after a CPD activity, including the ability to produce and retain the verification data specified in section 3.7 above.

Need to talk?

For more information on applying to be a provider of CISI Endorsed CPD Activities, please contact:

endorsedcpd@cisi.org

Chartered Institute for Securities & Investment,
20 Fenchurch street, London EC3M 3BY

 [cisi.org](https://www.cisi.org)

 +44 20 7645 0777

 endorsedCPD@cisi.org

 @cisi

 [cisi.org/linkedin](https://www.cisi.org/linkedin)