



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 a completed Application Form and CPD activity materials (see section 3 below) to alex.xavier@cisi.org or by post to Alex Xavier, Chartered Institute for Securities & Investment, 20 Fenchurch Street, London EC3M 3BY

and

- Select the relevant fee option and pay the fee (see Application Form for payment options).

The cost is:

£750 Annual Fee

+

£250 Endorsement Fee Per Activity

OR

£2500 Endorsement For Up To 10 Activities (Includes Annual Fee)

OR

£3750 Endorsement For Up To 25 Activities (Includes Annual Fee)

OR

£7000 Endorsement For Up To 50 Activities (Includes Annual Fee)

We aim to process applications within 5 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 below) for each CPD activity for which endorsement is sought to alex.xavier@cisi.org or by post to Alex Xavier, Chartered Institute for Securities & Investment, 20 Fenchurch Street, London EC3M 3BY

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.

We aim to process applications within 5 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 endorse only 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 used to illustrate a broader learning point, rather than be the focus of the presentation.
- must be up-to-date and factually correct
- may be structured or unstructured CPD. To be structured CPD, the activity must last for at least 30 minutes and the learning must be verifiable (see section 3.7 below). CPD activities that meet other requirements but last for less than 30 minutes or are not verifiable will be classed as unstructured CPD.

3.4 Delivery

CPD activities may be delivered in the following formats:

- 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
- 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:

Structured CPD Activity	Required Provider Records (to be retained for 2 years)	Suitable Verification Methods
Face to face activities	A register of attendees	<ul style="list-style-type: none"> • A CPD attendance certificate • Some form of test either at the event or after the event*
Live webinars	A register of active participants	<ul style="list-style-type: none"> • A CPD participation certificate
Elearning	A register of active users	<ul style="list-style-type: none"> • A record of time spent on the activity • A record of assessment inputs results, such as test answers and/or scores
Other online activities – some form of test must be included in the activity for it to be classed as structured CPD		<ul style="list-style-type: none"> • A record of assessment inputs results, such as test answers and/or scores.
Written word activities – some form of test must be included in the activity for it to be classed as structured CPD		<ul style="list-style-type: none"> • A record of assessment inputs results, such as test answers and/or scores.

* This could be by an activity built into the activity, for example, some questions (written or multiple choice) set as an individual or group exercise, or a paper based or online questions that the delegate completes after the event.

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:


Alex Xavier, Assistant Director, Member Services

alex.xavier@cisi.org

020 7645 0725

Chartered Institute for Securities & Investment,
8 Eastcheap, London EC3M 1AE

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

 +44 20 7645 0777

 customersupport@cisi.org

 @cisi

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