



CIMA CPD product accreditation scheme

Guidelines and policy

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About CIMA

The Chartered Institute of Management Accountants (CIMA), founded in 1919, is the world's leading and largest professional body of management accountants, with over 232,000 members and students operating in 177 countries, working at the heart of business. CIMA members and students work in industry, commerce, the public sector and not-for-profit organisations. CIMA works closely with employers and sponsors leading-edge research, constantly updating its qualification, professional experience requirements and continuing professional development to ensure it remains the employers' choice when recruiting financially-trained business leaders.

Professionalism and ethics are at the core of CIMA's activities with every member and student bound by robust standards so that integrity, expertise and vision are brought together.

Together with the American Institute of CPAs (AICPA) CIMA has established the Chartered Global Management Accountant (CGMA) designation. CGMA is the global quality standard that further elevates the profession of

management accounting. The designation recognises the most talented and committed management accountants with the discipline and skill to drive strong business performance.

The AICPA and CIMA also make up the Association of International Certified Professional Accountants (the Association), which represents public and management accounting globally, advocating on behalf the public interest and advancing the quality, competency and employability of CPAs, CGMAs and other accounting and finance professionals worldwide.

For more information please visit cimaglobal.com

Introducing CPD

The CIMA CPD product accreditation scheme recognises and promotes products and services that benefit CIMA members' mandatory requirement to engage in ongoing CPD. All accreditations are subject to an application process that requires applicants to submit and demonstrate evidence of the quality of the product or service.

Once an application has been received it will be assessed by CIMA's CPD accreditation team. Processing may take up to six weeks following receipt of all relevant documentation. However, any missing or incomplete information may result in delays with the application. CIMA cannot guarantee that accreditation will be granted in time for applications that are received less than six weeks before a product may be due to launch.

Any information forwarded to CIMA as part of the application will be treated as confidential.

If the application is approved, the organisation will receive an approval letter pertaining to the product or service along with an electronic copy of the accreditation logo and an accreditation certificate.

CIMA's CPD product accreditation scheme gives recognition to products that help CIMA members in their professional development. Accredited products include training courses, qualifications, conferences, relevant literature and e-learning packages. The scheme is relevant to any market that might capitalise on CIMA's 100,000+ members.

Entitlements and benefits of accreditation

- ▶ The opportunity to enhance the visibility of your product/service to CIMA members.
- ▶ The CIMA CPD Product Accreditation Certificate.
- ▶ Permission to use the CPD Product Accreditation logo to promote the product or service.
- ▶ Listed on the CIMA website as an organisation with CPD product accreditation.
- ▶ Third-party assurance regarding the quality of the product or service.

Application requirements

In addition to completing the application form, applicants are required to provide the following:

- ▶ access to business registration documents and core financial statements such as an annual review or similar – this will apply to any organisation claiming overall or part ownership of the product
- ▶ independent access to the product or service for quality assurance purposes
- ▶ evidence relating to the history of the product's operation, if applicable
- ▶ previous satisfaction survey results for the product or service (if such research exists)
- ▶ copies of advertisements and any other marketing literature used to support the product or service
- ▶ copies of any policies in place to support the product or service.

Additions for courses:

- ▶ provide CIMA with syllabi for courses (if applicable)
- ▶ provide CIMA with a brief presenter biography – CIMA will also require details of how any training and development will be conducted
- ▶ provide CIMA with evidence to demonstrate the suitability of any venue and/or location and that any premise complies with health and safety standards
- ▶ provide CIMA with samples of learning materials such as workbooks.

Additions for qualifications:

- ▶ provide CIMA with syllabi for qualifications
- ▶ provide CIMA with any pass levels and rates
- ▶ provide CIMA with details of grading structures
- ▶ provide CIMA with details of assessment and moderation process.

Application fees

Applications are subject to an initial application fee of £1,000 +VAT. Successful applications are thereafter eligible to enrol and benefit under the CPD Product Accreditation Scheme. The CIMA CPD Product Accreditation is awarded for a period of three years. Annual subscription following the first year is £800 +VAT payable annually. A new application form may be required if the accredited product or services have changed substantially.

All payments should be made in pound sterling.

Organisations may apply to accredit more than one product or service.

CIMA reserves the right to charge an administration fee should any product or service require reassessment. Any fees that are quoted may be subject to change.

Code of practice

All products and services should adhere to health and safety regulations for the country in which the product is delivered. This includes any outsourced services such as venues that are used to support accredited products/services.

All examinations should have an objective moderation procedure to monitor the suitability of content for all exams.

All examinations should be assessed professionally and objectively.

Appropriate success/satisfaction evaluation procedures should be in place to monitor the progress and success of ongoing products and services. This should include an evaluation on whether the product meets its requirements to customers such as its learning objectives.

All presenters and lecturers must be qualified to a level beyond that of which is being taught or presented.

All materials used to market and communicate a product or service should be accurate and not misleading as to who the product or service is targeted towards and what it sets out to achieve.

All products and services should adhere to the education standards and regulations for the country in which they are delivered.

An accredited product or service should not infringe upon any copyrighted materials.

Obligations

The product or service should set out to achieve its objectives in line with the statements made on the accreditation application form. CIMA should be informed of any changes relating to this.

Application payments to CIMA should be made in full with the application.

Annual subscriptions should be paid in full annually.

Any significant changes to the delivery of the product/service should be immediately reported to CIMA.

Any significant changes to the operation or name of the organisation owning and/or producing the product/service should be immediately reported to CIMA.

Any significant changes to the content and/or delivery of the product should be immediately reported to CIMA.

The organisation of the accredited product or service should appoint an appropriate representative to liaise with and keep CIMA informed of any changes.

The organisation of the accredited product or service should permit CIMA representatives free access to the product or service upon request within a one month period for monitoring purposes.

The organisation of the accredited product or service should provide CIMA with an annual list of CIMA members who have purchased the product or service if requested.

Use of the CIMA CPD Product Accreditation logo

Only the CIMA CPD Product Accreditation logo – and no other version of the CIMA logo – can be used to support a product or service.

Organisations that obtain accreditation are not permitted to use the CIMA CPD Product Accreditation logo for any other product or corporate purpose.

It is not permitted to change or alter the colours of the logo.

Only the logo relating to the current year should be used.

It is not permitted to change or alter the logo in any way. This includes cropping any part of the logo or resizing it.

Any text accompanying the logo should only read: CPD Accredited <year>.

Any website used to promote a product or service is prohibited from hosting a domain name that is deemed by CIMA to be similar and/or confusing with the CIMA domain name and website.

The CIMA CPD Product Accreditation logo must be used in line with the CIMA brand guidelines which will be provided along with the logo upon your successful application.

Monitoring assessment

CIMA is permitted to monitor and access all accredited products and services during the accreditation period and will require full and independent access to any accredited product or service upon giving one month's notice period.

CIMA is entitled to request and obtain documentation detailing the content and operation of any product or service. This includes any documents that are required in the application process.

CIMA is entitled access to satisfaction evaluations in order to monitor the progress and success of ongoing products and services.

CIMA is entitled to investigate complaints from CIMA members who have used the product or service.

CIMA will request details from the organisation of the accredited product into how a complaint was dealt with. A complaint that is upheld may provide grounds for withdrawal from the accreditation scheme.

In the instance of a product or service failing to meet the description as set out in the application process, CIMA is entitled to withdraw accreditation.

CPD Product accreditation logo



Restrictions

It is the product that is accredited and entitled to the benefits associated to the accreditation scheme and not the organisation that owns or produces the product, or any other product or service.

Refunds are not permitted to any accredited organisation wishing to withdraw from the scheme.

Refunds are not permitted for products withdrawn from the scheme following a breach of the scheme guidelines and policy.

CIMA reserves the right to re-assess and withdraw accreditations if valid complaints are upheld by CIMA members regarding the delivery of products/services.

Accreditation does not constitute or involve a partnership with CIMA. CIMA does not therefore permit any statement to suggest any official or unofficial partnership or alliance.

Accreditation can only be claimed once the accreditation certificate has been issued, not when the application form has been submitted.

Successful accreditation is for a period of three years, after which, you will be required to complete a new application.

Withdrawal of accreditation

CIMA reserves the right to withdraw the accreditation from any product or service that fails to meet or breaches any of the requirements within the guidelines and policy. Any decision to withdraw accreditation will be final and at the sole discretion of CIMA.

CIMA may withdraw accreditation if voluntary bankruptcy is declared by any organisation owning or operating the product or service.

CIMA may withdraw accreditation if CIMA considers that the continued delivery of the product or service would be detrimental to the interests of the profession or CIMA members.

CIMA may withdraw accreditation if there is a poor standard of administration by the provider.

CIMA may withdraw accreditation if there is evidence that the provision of a product or service is below a standard deemed acceptable by CIMA.

CIMA may withdraw accreditation if fees are not paid.

Every effort has been made to ensure that the information contained within the application form and guidelines and policy is as accurate and as up to date as possible. However, CIMA accepts no responsibility for any loss which may arise from the information contained in the scheme documents.

CIMA reserves the right to change the criteria for accreditation by giving a two month notice period.



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