

SAFCA Member Continuing Professional Development Record

Continuing Professional Development (CPD) is the reinforcement or acquisition of skills or knowledge relevant to the workplace.

Application: CPD requirements apply to associate members and full/accredited members.

Amount: A financial counsellor must complete 20 points of CPD per annum.

Three categories

There are three categories of CPD:

Technical – e.g. content knowledge relevant to legal issues, banking, fines, EDR/IDR, superannuation, hardship, insurance, completion of Statements of Financial Position

Skills – e.g. counselling, mental health, communication (written, verbal), interviewing, cultural awareness, suicide prevention/training and negotiation

Ethics – e.g. conflict of interest, boundaries, counselling relationships, cultural awareness, options- client choices; appropriate referral to other services

CPD Components

The rules for how the various CPD components can be made up are as follows.

- There must be at least one activity from each of the three CPD categories of technical, skills and ethics.
- At least 3 CPD points must be derived in an interactive, face-to-face setting. This may be via video.
- A maximum of 10 points can be derived from any one CPD activity.
- Attendance at a plenary session of a conference is not CPD, unless training is delivered as a part of the plenary (as occurs from time to time at the SAFCA Conference).

There are also specific restrictions as set out in the CPD table following.

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CPD TYPE	Points
Face to face full day training block	6 points
Face to face half day training block	3 points
Preparation and delivery of a training session relevant to the sector	4 points
Online interactive activities e.g. webinar, elearning, online modules	1 hour equivalent to 1 point (max 4 points per online activity)
Audio-lecture / podcast/ webinar recording (listen/watch only)	1 point
Online questionnaires developed by financial counselling associations that test current knowledge	1 point
Reading article about technical and educative aspects of financial counselling	1 point (max 2 points in a membership year)
Research project contributing to policy work	3 points
Delivery of a training session relevant to the sector where the material has already been developed	2 points
Membership of a State/Territory financial counselling association board or FCA Representative Council	2 points maximum
Contribution of an article on a relevant topic to media / newsletter / association material	1 point
Supervisors only – provision of professional supervision to a financial counsellor	1 point per person supervised (max 4 points)
Mentoring a Diploma of Financial Counselling student on placement	1 point per person supervised (max 4 points)

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Members are expected to complete their own PD log. This log may be requested for Audit by SAFCA.

SAFCA PD Log

Member Name _____

Membership year ending _____

Name of Training Provider	Activity	Date	Number of Hours	How did this activity contribute to your professional development?	Category/categories Ethics/Skills/Technical	PD points

