



THE INSTITUTE OF LOSS ADJUSTERS OF SOUTHERN AFRICA

Professional Body for Loss Adjusters
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ILASA CPD POLICY

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1. Purpose of CPD

Compliance with the Continuing Professional Development (CPD) requirements of the ILASA is a condition of continuing membership as set out in the related policies

The purpose of CBD is

- 1.1. To ensure professional skills while supporting development in the loss adjusting profession.
- 1.2. Maintaining professional competence.
- 1.3. To ensure that loss adjusters understand that the primary responsibility for competence rests in the individual and that they have an obligation to develop and maintain professional competence.
- 1.4. To serve as one of the means for renewal of membership and retention of members designation.
- 1.5. Assist loss adjusters to render services with due care, competence and diligence and to maintain knowledge and skill at a level required to ensure that clients receive competent professional services based on up-to-date developments in legislation and industry practice.

2. Education committee

The ILASA Education Committee consists of executive members who represent different areas of specialty. The function of the committee is:

- 2.1. To oversee the CPD activities, processes and policies implemented by the ILASA.
- 2.2. To ensure that they are activities relating to job functions within the industry making CPD accessible and relevant to all who require it.

3. CPD requirements

3.1. Initial reporting

The CPD year will run from the first day in January to the last day of December each year to allow for certification at the time of membership renewal.

3.2. Annual CPD requirements

All active ILASA members must complete 18 hours of CPD during each annual reporting cycle for the following membership categories:

Candidate loss adjuster	18 CPD points
Licentiate loss adjuster	18 CPD points
Associate loss adjuster	18 CPD points
Fellow loss adjuster	18 CPD points

3.3. Earning CPD

CPD has been defined as either verifiable or self-assessed.

Verifiable CPD is where the activity or outcome can be observed by others. Self-assessed CPD would cover activities where the outcome is not directly observable by others.

3.4. Submitting CPD

CPD hours must be captured by the members throughout the annual CPD cycle either directly onto the My membership system or submitted to the ILASA Operations Manager to capture on their behalf.

3.4.1. All ILASA's national and regional event participation will be captured on the delegate's behalf against the attendance register which includes online teams meetings.

3.4.2. For all other activities members will be required to capture their own CPD onto their profile in the ILASA My Membership System or submitted to the ILASA Operations Manager to capture on their behalf.

4. Exemptions Or deferment of CPD activities

Individual applications by members will be considered by the ILASA Education Committee, on their merits.

Following a period of exemption or deferment any registered loss adjuster who wishes to resume their professional activities shall apply for reinstatement and a new CPD cycle will commence on 1 January of the year following reentry into practice.

Acceptable reasons for exemption or deferment may include:

- 4.1. Temporary withdrawal from active practice.
- 4.2. Physical disability illness or pregnancy with documented proof of such conditions.
- 4.3. Other extenuating circumstances as reviewed and approved by the ILASA Education Committee.

5. Categories of activities an allocation of CPD hours

There are various forms of activities that can be relevant to CPD. Below is a list of various activities that can be evaluated, recorded and rated for CPD purposes. It is important to note that whilst ILASA has applied due consideration for various types of activities the list is not exhaustive.

CPD hours must be obtained in the categories listed below. The minimum and maximum hours which may be accumulated annually are:

Verifiable CBD	10 hours minimum per annum
Self Assessable CPD	8 hours maximum per annum

Any relevant educational or developmental activity that does not fall directly within the activities listed in the following categories may be submitted to the ILASA Education Committee for approval and if this is granted the activity will be accredited.

5.1. Verifiable CPD categories

Appropriate activities that contribute to personal professional development which may include but are not restricted to attendance of formal learning opportunities. Members are required to earn a minimum of 10 points in this category per annum.

- 5.1.1. Conferences, congresses, seminars
- 5.1.2. Formal workshops
- 5.1.3. Lectures
- 5.1.4. Distance learning seminars
- 5.1.5. Self-study which is accompanied by formal evaluation
- 5.1.6. Formal tertiary studies
- 5.1.7. Publication in peer-reviewed journals
- 5.1.8. Papers presented at accredited conferences congresses or seminars
- 5.1.9. Preparation of ILASA CPD modules, setting examinations, evaluations and assessments, monitoring of education standards at tertiary institutions

5.2. Self-assessable CPD categories

- 5.2.1. In-house training sessions organised by individuals or firms
- 5.2.2. Organised formal small group discussions
- 5.2.3. Professional administration
 - Participation on committees, boards or annual general meetings where formal loss adjusting related presentations are included on the agenda.
- 5.2.4. Self-study or professional reading that is not formally evaluated
- 5.2.5. Training and mentoring
- 5.2.6. Supervision or evaluation of post graduate research studies
- 5.2.7. Participation in ILASA exam process

6. Definitions criteria and allocation of CPD for the two categories

CPD is allocated as 1 point for every hour of learning

6.1. Verifiable CPD categories

6.1.1. Conferences congresses seminars

Conferences, congresses or seminars are considered as one off events, that are presented by industry bodies or product suppliers. Conferences considered for CPD must address multiple subjects of technical, legal and industry relevant content.

Criteria:

- Open for attendance by any interested party
- The structure should encourage wide attendance

- Two types of conferences have been identified:

1. Networking conference will have no specific learning component and will consist of general interest presentations only
2. Professional development conferences will have specific learning focus by way of dedicated topics and sessions.

Rating:

hour for hour of learning sessions / 1 hour = 1 CPD points

6.1.2. Formal workshops lectures distance learning seminars

These are programs which do not lead to a qualification and could be technical formal learning, interactive, case studies, debate sessions or business related training skills. Attendance and completion can be verified.

CPD providers such as regional branch branches and other providers [training companies or product suppliers] of workshops apply to the ILASA to have their workshops approved for CPD.

Criteria:

- Presented by accredited training providers or in-house training departments and is not intended for casual on the job training.
- May or may not include formal assessment.
- May be delivered face to face ,online or by webinar
- Online delivery must contain a short assessment or certificate confirming engagement with the content

Rating:

hour for hour of learning sessions / 1 hour = 1 CPD points

6.1.3. Self study with a formal evaluation

Self study which includes but is not restricted to studying of books ,blogs, magazines or electronic or computerized material that is accompanied by formal evaluation.

Criteria :

Submission of the formal evaluation accompanied by the dates and time spent studying

Rating:

hour for hour of learning sessions / 1 hour = 1 CPD points

6.1.4. Formal tertiary studies

Individual learning, long-term or short-term study at a tertiary education institution.

Criteria:

An individual choosing to do a qualification as means of CPD must declare this at the beginning of the CPD cycle that it is their intention to do so and submit a copy of their registration with the details of the relevant institution.

Only subjects that are relevant to the insurance industry will be considered for CPD

and candidates will be notified accordingly upon receipt of their registration by the ILASA.

Upon completion candidates are required to submit the exam results to qualify for the CPD rating provided.

Rating:

Hour equivalent rating of 30 minutes per credit will be allocated ie: 30 credit skills will accumulate 15 CPD points

6.1.5. Publication in peer reviewed journals or papers presented at accredited conferences congresses or seminars

Written articles papers or reports which are published in peer reviewed journals or presented at accredited conferences seminars or congresses for the use by others and if the content is published or presented relates to the insurance industry or loss adjusting profession.

Criteria:

- Evidence must include date of publication and show the member as the author or co-author or editor
- List of references used to source information
- Logbook or journal of reflecting writing hours spent and number of words

Rating:

hour for hour of learning sessions / 1 hour = 1 CPD points

6.1.6. Preparation of ILASA CPD modules

Preparation of ILASA setting exams, CPD modules, assessments monitoring of education standards at tertiary institutions.

Criteria:

Confirm through a log the number of hours spent researching and writing the content for the ILASA exams.

Participation must be approved but the ILASA education committee.

Rating:

hour for hour of learning sessions / 1 hour = 1 CPD points

6.2. Self-assessable CPD categories

6.2.1.in-house training sessions and organised small group discussions

Inhouse skills training sessions organised by individuals or firms.

Criteria:

Verifiable proof must be submitted including the date of the session, content of the session, time spent learning in the session and names of other participants in group discussion events.

Rating:

hour for hour of learning sessions / 1 hour = 1 CPD points

6.2.2. Professional administration

Professional administration includes participation on committees, boards, annual general meetings where formal loss adjusting related presentations are included on the agenda, for example ILASA Regional Committee meetings.

These committees must be formally constituted and present a regularly recurring program that extends for a year with a minimum of four to six meetings.

Criteria:

- A copy of the terms of reference for the committee must be presented.
- An attendance list of committee members present in the meeting must be submitted showing the date, time and duration of the meeting.

Rating:

hour for hour of learning sessions / 1 hour = 1 CPD points

6.2.3. Self study or Professional reading

Self-study which includes but is not restricted to studying of blogs, books, journals, legal snap shots; consultation with experts, all electronic or computerized material that is not accompanied by formal evaluation.

Criteria:

- List the author's name or name of the expert, the title of the book or short description of the consultation topic and or details of the publication such as the year of publication and number of pages read.
- Describe in short how the content of the reading has contributed to the individual's ability to operate more effectively in a professional manner for current and future clients, or the enhanced business practice of the individual and record the number of hours spent reading or learning.

Rating:

hour for hour of learning sessions / 1 hour = 1 CPD points

6.2.4. Training and mentoring AND Supervision or evaluation of post graduate research studies

Providing or receiving training, guidance, instruction or support from colleagues.

Criteria:

- Logbook or journal of hours spent giving or receiving training or mentorship.
- Include the subject title, name of mentor or trainees and hours spent

Rating:

Mentors: 20% of time spent mentoring will apply

Trainees: hour for hour of time spent learning

7. Disciplinary procedures

ILASA members who fail to comply with the annual CPD requirements within 30 days after the cycle has ended will have their membership affected.

Candidate members will have their membership terminated and

Designated members will have their designations revoked.

Designated members will have to apply to rewrite the board exams in order to regain their designation.

8. Appeals and motivation

Should a member or CPD provider feel that the ILASA's approval process has been incorrectly applied for the rating of a CPD activity, in terms of the application of criteria, an appeal may be lodged for the Education Committee's consideration.

Should an applicant wish to apply for CPD rating for an activity and the activity does not entirely match the criteria as stated above, a motivation may be submitted for consideration by the Education Committee for that unique activity

The Education Committees decision will be final.

Falsification of information

Should it be found that an individual or CPD provider has falsified information, verification documents or submissions, the ILASA reserves the right to disallow the CPD rating for that activity. This will be done through the Education Committee and where needed will be elevated to the Membership Committee as established as part of the ILASAs disciplinary process as detailed in the Constitution and Bylaws of the Institute.

An appeal can be lodged with the Membership or Education Committee which is established as part of the ILASAs disciplinary process for members. Should any individual feel that they have received unfair judgment on the part of the ILASA or the Education Committee in relation to alleged falsification of information, verification of documents or submissions.

All appeals must be sent in writing to the committees mentioned above.