



Guidelines for FPA Accredited CPD Assessors

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Table of Contents

Introduction.....	3
Role of an FPA Accredited CPD Assessor.....	3
FPA and FPA Accredited CPD Assessors	3
Assessing CPD Content.....	4
CPD Introducing the new criteria.....	6
Professional Dimensions.....	7
Communicating CPD Results.....	8
Record Keeping.....	8
Audits.....	8
Assessor Support Tools.....	9
Basic Instructional Design Model 101.....	11
Adult Learning Principles	12
Lesson Plan.....	14
Program Evaluation Form	15
Online Design Checklist.....	16
Instructional Design and Delivery Checklist.....	17
Basic Rules for Presentations	18
CPD Assessor Recording Template.....	20
Professional Dimension allocation checklist	21



Introduction

This guidance document has been developed to supplement the FPA CPD Policy for 2015 to assist CPD Assessors to practically apply the requirements therein.

The FPA have developed a number of forms, checklists and tools that model the desired design, development and delivery specifications that aim to establish clarity and improvement in how programs are constructed and consistently assessed for quality and alignment to member's professional and personal goals.

Role of an FPA Accredited CPD Assessor

The CPD Assessor is primarily responsible for evaluating education programs and activities against the FPA CPD Policy and FPA Accreditation Guidelines in determining;

- Relevancy of the program to the profession of financial planning
- Quality of the instructional design components of the program
- Professional Dimension/s covered and number of CPD hours that may be allocated
- Maintaining records of programs and activities that have been assessed for audit purposes

The FPA considers the role of CPD Assessors as critical to encouraging a higher quality and more rewarding range of educational and personal development activities. At the centre of this focus sits the FPA's Professional Dimensions model which recognises that professional competence should be built on a combination of abilities, knowledge and professional skills, beyond the technical capabilities identified in RG146.

A commitment to CPD is critical in building regulator and community trust. But even more than that, CPD is critical to nurturing our members and presenting and challenging them with new skills and knowledge that make their work and their professional life more rewarding.

The responsibilities of an Assessor, coupled with your own unique role within your organisation, enable you to advocate and influence a more holistic approach is taken to CPD. The development and sourcing of higher quality learning activities, more aligned to best practice methodology are necessary to ensure the diligent and competent practice of the profession of financial planning. The FPA consider a CPD Assessor is central to encouraging acceptance of the industry's status as a profession and we are committed to assisting and supporting you wherever possible, beyond the implementation of the new guidelines.

FPA and FPA Accredited CPD Assessors

The FPA will accredit those CPD activities that are developed with the aim of marketing and delivering them to the general financial services community.

FPA Accredited Assessors are permitted to accredit CPD activities that are delivered internally to their organisation only.

- The CPD Assessor assesses CPD activities that are developed and delivered for internal purposes only.
- The CPD Assessor attends an external CPD activity and warrants it relevant to employees of the organisation. The CPD Assessor assesses the activity for CPD hours and notifies the internal staff of how many CPD hours they can claim for the activity if they attend.
- The CPD Assessor is contacted by an employee who has attended an externally delivered workshop and requests CPD hours. So long as the CPD Assessor has the requisite documentation, the CPD



Assessor can assess the activity and allocate CPD hours for the benefit of the employee/s within the organisation only.

Assessing CPD Content

The FPA assesses CPD activities and programs according to how they align with the requirements of these guidelines and those embodied in the CPD Policy.

Whilst no one formula can be applied to all programs and activities to derive a consistent and exacting outcome, the FPA reference a number of checklists, practice standards and tools to assist to manage the level of subjectivity inherent in such a process, to promote consistent application of the standards.

Uppermost during the assessing process are two key principles the FPA consider as a cornerstone to determining the merit of the activity;

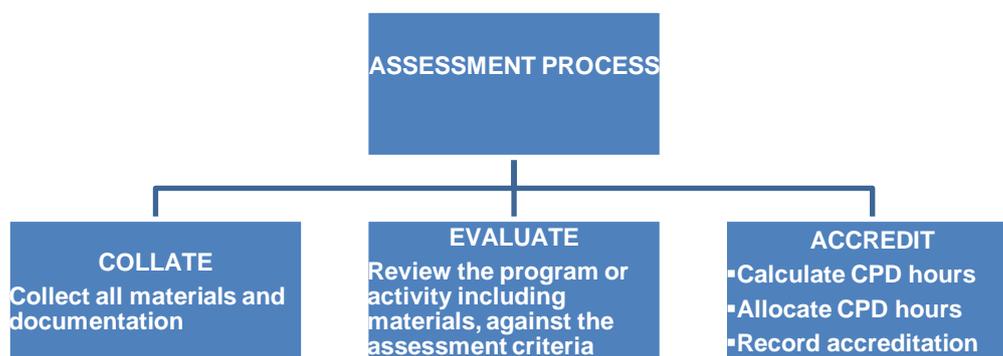
2. The FPA's revised definition of 'professional development' and
3. The quality of the instructional design components

FPA's revised definition of Professional Development is;

About engaging in activities that systematically assist professionals to enhance their knowledge, skills and general life attributes so as to achieve professional and organisational goals; it is not an end to itself it is continuous and directed towards maintaining the knowledge, skills and competence necessary for the diligent and competent practice of the profession of financial planning.

Programs must be written in the context of participants being Financial Advisers or members of the Financial Services Industry with the content set at the appropriate level i.e. beyond minimal education requirements.

As part of its approach to assessing programs and activities for CPD, the FPA adopt a systematic approach based upon three fundamental processes;





CPD Assessor Checklist

The assessor checklist summarises some of the key considerations of the assessment process into a simple to follow step by step guide.

Collate	1. Collect all the relevant materials for the program being accredited.	
	The following components are essential. Without these, you cannot accredit the program.	The following components will also provide further information during evaluation:
	<ul style="list-style-type: none"> ▪ A program agenda including duration of each component ▪ A copy of the program contents e.g. notes, hand-outs, activities, presentation etc ▪ A brief bio of the facilitator, subject matter expert or presenter including qualifications & experience in Financial Services or Instructional Design. ▪ A copy of the evaluation or feedback form 	<ul style="list-style-type: none"> ▪ A copy of the session plan ▪ A copy of the leaders/facilitation guide ▪ Basis for the training – Information that demonstrates what process was adopted to identify the training need and how the proposed training aims to address this need. A copy of the assessment used to determine comprehension
Evaluate	<p>2. Evaluate the quality of materials collected and determine whether any additional information needs to be gathered.</p> <ul style="list-style-type: none"> ▪ Has clearly identified learning objectives. ▪ The content is current and developed by subject matter experts. ▪ The content aligns to one or more segments of the professional dimensions model ▪ Includes activities and/or case studies to reinforce learning ▪ Participant feedback is elicited to rate the program and improve its effectiveness ▪ Evidence of completion of the program is provided to participants <p>Active (more advanced) educational programs should also include:</p> <ul style="list-style-type: none"> ▪ Evidence that the participant training needs were researched, identified and incorporated in the program ▪ Evidence that the program was developed by a professional instructional designer in conjunction with subject matter experts ▪ Comprehensive facilitator and/or leaders guide ▪ Detailed participant handouts and/or workbook ▪ A high degree of interaction and provides opportunities for learners to actively participate e.g. role plays, discussion, peer-to-peer, case studies etc. ▪ Instructional design takes into adult learning principles i.e. Motivation, Reinforcement, Retention and Transference. ▪ Participant competency was assessed against the learning objectives. 	
Accredit and Record	<p>3. Based on your analysis, accredit and record the activity.</p> <ul style="list-style-type: none"> ➤ Determine which professional dimension/s the content aligns to ➤ Calculate the number of CPD Hours applicable ➤ Record the number of CPD Hours allocated to the activity in your CPD register. <ul style="list-style-type: none"> ○ Advise the program coordinator of the hours and accreditation number that need to be included on the participant CPD certificates. ○ Keep a copy of the program materials and evidence for a minimum of 5 years. 	



CPD Introducing the new criteria

The aim of the criteria upon which all programs and activities are to be evaluated is to both, set a minimum level of expectation of what is acceptable and to encourage the raising of standards around;

- the identification of the learning needs
- the design of the program/activity (incorporating structure, delivery and assessment)
- the development of the curriculum and material

The criterion is designed to provide for a more meaningful way in which programs and activities can be identified and recognised as either 'information only' sessions, or a learning experience which incorporates the necessary sub processes instrumental in best practice learning and development methodology.

In order for a CPD program to be accredited, it must meet certain standards and requirements. CPD activities need to fit into either of two categories of '*passive*' or '*active*' learning.

Passive learning is often learning which occurs through the delivery of information where the instructor is deemed to be the textbook verbalising to a passive audience. Professional development of the learner or participant is limited often owing to the fact such programs do not include opportunities to practice applying the new information nor exercises to reinforce how it leads to improved skills or behaviour. The level of engagement and reinforcement with the audience is somewhat limited.

Active learning is often learning that follows an instructional design methodology incorporating adult learning principles and concepts that maximise the learning environment to stimulate participants to take ownership for their learning. The instructor provides examples and illustrations of the concepts and principles and facilitates activities involving the learners to practice and reinforce improved skills or behaviour through constructing and using the new knowledge with the instructor's guidance.

General criteria for all activities:

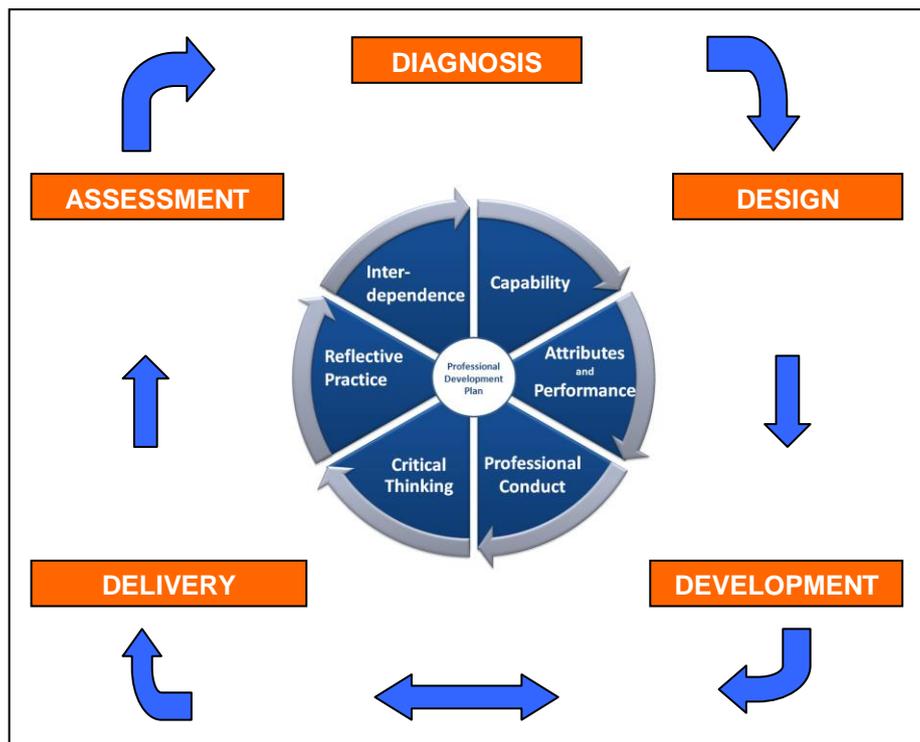
- Have clearly identified aims and objectives.
- Include content that is structured, current and developed by subject matter experts.
- Have content that aligns to one or more segments of the professional dimensions model.
- Evidence that course evaluation results are recorded and acted upon through the implementation of a continuous improvement or similar action plan initiative
- Provide Certificate of Completion/Attendance of the program to the participant which identifies CPD professional dimension/s addressed.

Additional criteria for 'active' learning programs:

- Evidence of research conducted identifying the learner's needs and alignment to the program outcomes.
- The program reflects an instructional design methodology that incorporates the key adult learning principals including Motivation, Reinforcement, Retention and Transference (see Appendix A)
- Participants receive course materials that promote action based learning e.g. identifies typical role based scenarios and solutions that illustrate the practical application of skills and knowledge.
- Assessment – a standard of measure is identified to assess learning has occurred and participants have been assessed against it.

Professional Dimensions

Our **Professional Dimensions Model** broadens the scope of development opportunities that can be taken as CPD which we hope will encourage members, educators and employers to identify and engage in activities that support them to perform better and grow as professionals.



From an assessing perspective, CPD must be mapped to the Professional Dimensions model.

Any CPD activity aligned to RG146 fits easily into one or a number of the six dimensions of this model. For instance, compliance can automatically fall under the capability dimension.

Overlaying the professional dimensions are five key components integral to the identification of learning needs and the design, development, delivery and assessment of the effectiveness of CPD programs and activities. The illustration of the integrated professional dimensions model and the learning continuum model (above) reflects the FPA vision of inspiring and encouraging both a holistic approach to CPD and the development of quality education programs.

Diagnosis	Why the training needs to happen and for what benefit
Design	What you will do, why you will be doing it and the best ways to accomplish the learning objectives
Development	The content to satisfy the objectives is identified including a selection of varying methods to effectively deliver the message and alignment of formative and summative assessment/s
Delivery	Use of specific and varied means to deliver the material and reinforce the learning at key intervals – facilitation of delivery and reinforcement
Assessment	How well were the objectives understood and achieved? How efficiently was the program conducted? How can the program be improved? How effectively will the training be transferred? to the work place? What measures will you consider?



Communicating CPD Results

For programs or activities that have been assessed and accredited by a CPD assessor, information of such must be made available to potential participants internal to the assessor's organisation.

Information should include the following;

- Program Name
- Program Date
- CPD hours allocated to each Professional Dimension

In addition to the above, Assessors should also ensure that any employees who complete or attend the accredited program, are provided evidence of having undertaken the CPD Activity e.g. a record of attendance, certificate of completion or similar including updating any internal CPD tracking/database or report.

Record Keeping

Assessors must retain a record of all activities accredited as CPD including the following information or documents:

- A copy of the CPD Assessor Record Keeping Template
- CPD activity materials (facilitator, participant notes including any assessments) where applicable
- Copies of completed assessor checklist/s

Documentation must be kept for five (5) years.

Audits

In order to ensure that CPD Assessors apply the CPD Policy consistently and correctly, the FPA will conduct random audits throughout the triennium.

If you are selected for an audit, you will be notified in writing and be requested to submit the following documentation to the FPA for review.

- A copy of the CPD Assessor Record Keeping Template
- Copies of learning materials
- Copies of completed assessor checklist.

On completion of the review, the FPA will provide feedback to the CPD Assessor. In cases where the audit criteria have not been satisfied, the FPA may request the CPD Assessor to undertake further training. Significant breaches of the CPD or these guidelines (non compliance) or failure to respond to the audit request will result in both notification being issued to the licensee and cancellation of CPD Assessor Status.



Assessor Support Tools

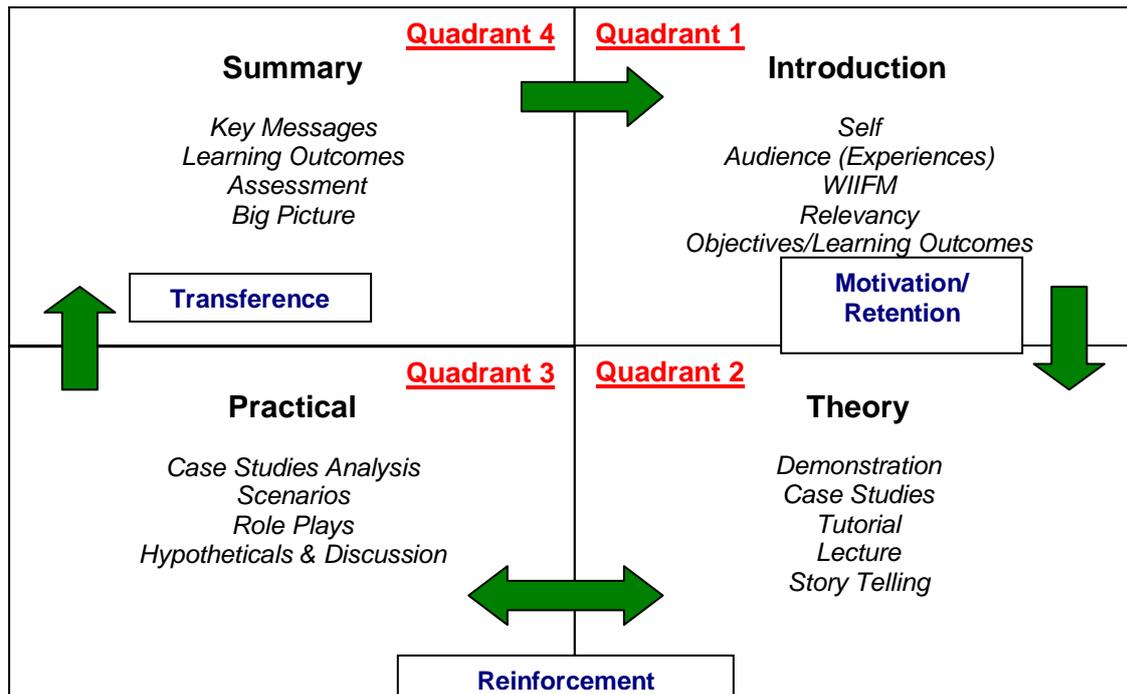
Appendices	Purpose	Page
A Basic Instructional Design Model	The model attempts to simplify the instructional design process by focussing on four key elements. Whether it is a program to acquire skills, knowledge or to modify/change behaviour, the basic model encapsulates the key set of components from which to produce a fundamentally sound program.	10
B Adult Learning Principles (Glossary)	This glossary underpins the language in the Basic Instructional Design Model and aims to provide both a definition and explanation of the adult learning principles as applied to the model.	11
C Session Plan Template	A sample outline of a training/lesson plan to illustrate the types of information usually captured. It is often used as a single instructional document and necessary guide in that it details the instructors and learners actions through the delivery of the course, course objectives, resources, materials utilised, timing and/or duration of the lesson. It can provide an assessor a detailed map of the program from which a number of criteria is responded to.	14
D Program Evaluation form Template	A sample evaluation form that identifies the key areas to elicit feedback from participants so as to determine the effectiveness of the key elements of design, development and delivery and identify opportunities to improve the process.	15
E Online Design Checklist	A list of variables to assist with the design and development of online learning programs. The list classifies under five key elements aspects to consider in creating an effective, engaging and learner focussed program. The assessor is able to use the checklist as a guide to determine the structure of the program and content.	16
F Instructional Design and Delivery Checklist	A list of variables to assist with the design and development of online learning programs with a focus on alignment to key adult learning principles including examples of integrating blended learning, critical thinking and problem solving activities. The assessor is able to use this checklist as a 'cheat sheet' to identify and ascertain the relevant factors that have been considered as part of their own evaluation of the content structure.	17
G PowerPoint Guidelines (Basic)	A checklist of do's and don'ts with regard to the development of presentation material. Assessors can use this checklist as a reference to check the structure of the content and where appropriate, inspire improved design/development from instructors.	18



<p>H CPD Assessor Record Template</p>	<p>A template to assist CPD Assessors to record the appropriate CPD information in a consistent format</p>	
<p>I Professional Dimensions Checklist</p>	<p>This checklist has been designed to assist CPD assessors allocate the correct professional dimensions to learning activities</p>	



Basic Instructional Design Model 101



There are four critical elements of learning that must be addressed to ensure that participants learn irrespective of whether it is to acquire new skills, knowledge or to modify behaviour. Those four elements are;

Motivation

- participants must recognize the need for the information
- the instructor must establish rapport and prepare participants for learning
- the degree of difficulty should be set appropriate to challenge the participants

Reinforcement

- should be used to encourage correct modes of behaviour and performance
- use it on a frequent and regular basis early in the process
- use it to maintain consistent, positive behaviour

Retention

- in order to retain information participants must see a meaning or purpose for the information
- participants must be able to interpret and apply the information
- retention is directly affected by the amount of practice during the learning and feedback on progress made towards the goals

Transference

- participants can associate the new information with something they already know
- the information revisits a logical framework or pattern
- elements learned are extremely beneficial when applied on the job



Adult Learning Principles

Part of being an effective instructor involves understanding how adults learn best. Compared to children and teens, adults have special needs and requirements as learners. The following principles have been included for guidance only to assist with program design concepts and development and do not constitute the full or final glossary of principles on the subject.

Self

The facilitator introduces himself or herself. This is an opportunity for the facilitator to provide a brief description of their skills and experiences in the topic to be discussed including a mention of the expertise of the people that designed and developed the learning material (if not the facilitator). Adult learners are more responsive if material has validity and the facilitator has credibility (via experience).

Audience

Adults who are motivated to seek out learning experiences do so primarily because they have a use for the knowledge or skill being sought. Learning is a means to an end, not an end in itself. It is also important to recognise adults need to be able to integrate new ideas with what they already know, if they are going to keep and use the new information. Adults bring a great deal of life experience into the classroom environment and it is a good idea to acknowledge this early in the introduction. Adults can learn well and much from respected peers who are usually happy to be tapped and used. An effective approach is often to elicit information from the audience giving them the opportunity to share their broad knowledge and experiences with the rest of the group. It is then opportune for the facilitator to identify and manage expectations before getting into content. This approach can also allay age concerned adults who frequently worry about being the oldest person in a class and fret about the impact this may have on their ability to participate with younger audience. Dissipation can also be supported through the articulation of WIIFM (what's in it for me?)/Relevancy.

WIIFM/Relevancy

Adults are intrinsically motivated. Learners increase their effort when motivated by a need, an interest, or a desire to learn. They are also motivated by the relevance of the material to be addressed and learn better when material is related to their own needs and interests. For learners to be fully engaged in learning their attention must be fully focused on the material presented.

Objectives

Adults are goal oriented/relevancy oriented. Adults need to know why they are learning something. Learning objectives, when determined ensure that everybody is working towards the same goal. When learners agree a target with a facilitator they feel more involved in the learning process. This helps focus attention and promotes a unified sense of purpose. Eliciting of the learner's needs and the conducting of a training needs analysis should ensure the objectives are appropriate for the audience. Learning objectives when defined should usually begin with a verb e.g. define, identify etc, that way it is easier to evaluate the level of a learners understanding at the conclusion of the program.

Theory

Adults have needs which are concrete and immediate. They can be impatient with long discussions on theory and like to see theory applied to practical problems. They are task or problem-centred rather than subject-centred. Adults are interested in theory when it is linked to practical application. Adults can listen with understanding for 90 minutes and with retention for 20 minutes so try and involve them every 8 minutes.

Organisation of content

Learning is easier when content and procedures or skills to be learned are organised into meaningful sequences. Learners will understand and remember material longer when it is logically structured and carefully sequenced. Also, the rate of information to be presented should be determined in terms of the complexity and difficulty of content. Thus the learner can be helped to better synthesise and integrate the knowledge to be learned. You need to provide the signposts that will help learners to perceive the structure.



Participation

Educating is imparting knowledge; training is 'activity leading to skilled behaviour'.

In order for learning to take place, a person must internalise the information; merely seeing or hearing is not enough. Learning requires activity. Active participation by the learner is preferable to lengthy periods of passive listening and viewing. Participation means engaging in mental or physical activity that will help the learner to understand and retain the information presented.

Application

Complete understanding has taken place only when the learner is able to apply or transfer the learning to new problems or situations. First, the learner must have been helped to recognise or discover generalisations (concepts, principles, rules) relating to the topic or task. Then opportunities must be provided for the learner to apply the generalisations or procedures to a variety of new, realistic problems or tasks.

Association

Learners will learn and remember information better if they have many associations to it; the learning of isolated information is more difficult and less permanent than the learning of information that is related to prior knowledge.

Practice and Repetition

Rarely is anything new learned effectively with only one exposure. Provision should be made for frequent practice and repetition, often in different contexts, for long-term retention to be encouraged.

Feedback

Learning is increased when individuals are periodically informed of progress in their learning. Knowledge of successful results, a good performance, or the need for certain improvement will contribute to continued motivation for learning. Doing and feedback lead to successful learning.

Summary

Revisiting the learning objectives with the audience will reinforce the success of the experience for them. It should also allow reflection on what the expectations might be post training.

Post training support through the identification of key contacts as well as materials that can be used as quick reference guide/s (e.g. cheat sheets, manuals etc) will help to ensure the transfer of the knowledge and skills is adapted more effectively to the learners work environment.

End each session with a conclusion that connects what has happened today with a broader strategy or objective, one that is mutually understood and beneficial to both parties.



Lesson Plan			
Date: Program Name: Unit Duration: Any single activity that deals with one specific topic. It may last from a few minutes to a few days depending upon the subject.		Objectives: Detailed description of knowledge, abilities, performance that must be acquired by participants in order to achieve the competences assumed as objectives They should be measurable and usually start with a verb so they are able to be demonstrated by participants. Performance Standards: Levels of achievement/mastery that are deemed exemplary or appropriate, i.e. specifications of how good the work of a participant must be to meet the content standards. Performance standards shape expectations for educational outcomes.	
Context: The circumstances relevant to the consideration of the development and design of the program. In the context of the training, it refers to the position and impact the program has on the culture, policy, organisational framework, documentation, infrastructure, practices, and assessment resources of an organisation or industry.			
Equipment: These are tools used to arouse and maintain interest, simplify instruction, accelerate learning and improve and aid retention.			
Time: The amount of time required to complete the lesson or a segment of the lesson	Facilitator/Instructor/Presenter Action: The instructional input—what the facilitator/instructor plans to do and say including any guided practice	Learners Action: The anticipated or expected level of response from the learner to the knowledge being imparted.	Materials/Equipment: These are resources to be used at the facilitator’s discretion that aim to leverage supplementary tools/props/resources to transfer knowledge through varying the technique or instruction.
Assessment: The process of gathering and judging evidence in order to decide whether a person has achieved a standard or objective			



Program Evaluation Form

Workshop Unit Name:	
Location:	Date:
Name (Optional):	Company:
<p>What did you think of this workshop? To assist us to identify areas in which we can improve, or to tell us what worked really well, we'd appreciate you completing this questionnaire and returning it to the facilitator.</p> <p><i>Please tick (✓) the appropriate response to each question which best describes what you thought of the program.</i></p>	

	<i>Excellent - Good - Fair - Poor</i>			
Content	4	3	2	1
Current and informative material				
Relevancy of content (<i>did it meet your objectives?</i>)				
Useful content				
Environment				
Environment	4	3	2	1
Were you able to contribute freely				
Were there minimum disruptions				
Was the location and size of the room suitable				
Educational Methods				
Educational Methods	4	3	2	1
Used suitable learning activities				
Quality of the materials used to present information				
Length of program appropriate				
Workbook and handout material available				
Facilitator				
Facilitator	4	3	2	1
Enthusiastic and approachable				
Understanding of the topics and issues				
Organised and professional				
<p>What did you enjoy most about the program?</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>What did you enjoy least about the program?</p> <p>_____</p> <p>_____</p> <p>_____</p>				



Online Design Checklist

Course navigability and organisation

- Syllabus and required instructional materials are easily located
- Links to other parts of the course or external sources are accurate and up-to-date
- Numbers identify sequenced steps; bullets list items that are not prioritised or sequential
- Course content is organised in a logical format
- Topics are clearly identified and subtopics are related to topics
- Course schedule is available in a printer-friendly format for participant convenience
- Folders have descriptions before opening them
- Top level links have no files that increase load time (e.g., audio files or animations)
- Nothing should be more than three clicks from the top level

Syllabus includes

- Course objectives and level of desired competency explicit
- Course completion requirements
- Explanation of relevance of course material
- Timeline for participant participation is clear
- Faculty member(s) introductory information
- Expectations of availability of and turnaround time for contact with instructor
- Course schedule is summarised in one place

Aesthetic design

- Typeface choice and contrast between text and background enhances readability
- Appropriate images supporting course content add visual interest
- Design keeps course pages to a comfortable length with white space
- Consistent theme used throughout
- Appropriate level of humour cultivates interest in course materials

Consistency in course

- Layout of course is visually and functionally consistent
- Navigability is clear, simple and user friendly
- Spelling and grammar are consistent and accurate
- Written material is concise, sentences and paragraphs brief
- Language of written material is friendly and supportive
- Clear directions are given for each task or assignment
- Links to outside web sites open in a new browser window

Accessibility

- Accessibility concerns are addressed throughout the course, including transcripts of any non-text objects
- Images are optimised for speedy display and include alternative text
- Alternative formats of materials provided, when possible (e.g., optional print packet of extensive reading materials available, CD of audio clips used in course, low bandwidth alternative for multimedia elements, PDF for a print option, etc.)



Instructional Design and Delivery Checklist

Goals and alignment to learning objectives

- Pace of delivery of course content is managed
- Reading and writing requirements are consistent with participant abilities and course unit load
- Course content is “chunked” for more manageable learning
- Instructional design is made clear (e.g., is it self-paced, or group-paced)
- Pre-survey asks participants to identify expectations or concerns to help tailor the course

Learning objectives and activities are integrated

- Reading assignments match learning objectives
- Activities lead to learning desired concepts
- Instructional material may be reviewed repeatedly (built-in redundancy)
- Summary provided frequently, particularly at the end of topics, to reinforce learning

Activities to enhance participant learning (addressing multiple learning preferences)

- Video clips of interviews, movements
- Historical audio clips of famous speeches
- Screen animations (“viewlets”) for instructional exercises illustrating software use
- Online journals or personal interview reports
- Participants report back with reviews of web-based resources
- Crossword or word search puzzles
- Matching and game-show-style trivia games
- Online scavenger hunt / Web Quest
- Annotated bibliography
- Guest speakers facilitate participant discussions
- Flash simulations

Activities to develop critical thinking and problem-solving skills

- Discussions centre on questions without a single correct answer
- Compare and contrast exercises
- Case studies or “real world” scenarios requiring web-based research
- Role playing
- Critique classmates’ assignments
- Collaborative exercises



Basic Rules for Presentations

Contrast is important

For paper...

- Dark text on a light background.

For projection...

- Light text on a semi-dark background.
- The eye is attracted to the light on the screen.

- Stick with a single background.
- The background is the stage for your information.
- Set the stage and leave it alone!
- Don't try to dazzle the audience with graphics or style...but with the information.
- The medium is not the message.
- The information is the message.

Balance

- Do not center bullet points
 - It makes the text ragged.
 - And hard to read and follow with your eyes.
- Generally, left-justify bullets.
 - This keeps things neat.
 - and easy to follow.
- Centered graphics leave little room for text.

Capitalisation

- Use Restraint With Fonts
- Employ only a few - stick to familiar fonts
- Stay away from gimmicky fonts unless for a theme.
- Keep type sizes consistent.
- Serif versus San Serif.
- DON'T USE ALL CAPS.

Fonts

- *Italics are more difficult to read.*
- Use **bold** when you want some words to stand out.
- Font size
- Easy to read (18 pt – 48 pt)

Avoid Text Overload

- Having too much text on the screen can defeat the purpose of using PowerPoint. The slides begin to look like a jumble of text, making slides difficult to read and unrecognisable from each other. People will either try to read everything or copy everything down or they will lose interest. List only the key points. If you have more info to include use more slides or create handouts.



- Basic Rules That You Must Have to Have a Good Presentation**
 - One of the most common mistakes in creating a presentation is to place too much information on the screen. This can cause the reader to become distracted from the speaker...just like you are now. Audiences are much more receptive to the spoken word.

- Basic Presentation Mistakes**
 - Too much information.
 - Reader gets distracted
 - Audiences are much more receptive to the spoken word

- Basic Rules**
 - Keep it simple.
 - Make bulleted points easy to read.
 - Keep text easy to understand.
 - Use concise wording.
 - Bullets are focal points.
 - Presenter provides elaboration.
 - Keep font size large.

- Basic Power Point Guidelines**
 - Use builds...don't give them too much info at once.
 - Stick with the same transition.
 - Be creative but leave some colour choices to professionals.
 - Six words per line.
 - Six lines per page.

- Choosing a Colour Scheme**
 - Stick with power point defaults.
 - What may look good on your computer may be unreadable in the classroom.
 - Remember to use strong, contrasting colours.

- Use Contrasting Colours**
 - Light colours on dark background.

- Clip Art & Graphics**
 - A few excellent graphics are better than many poor ones.
 - Photographs can be powerful.
 - Use sparingly!



CPD Assessor Recording Template



CPD Assessor Log

Name: _____ Date Range: _____ Assessor ID: _____
 Organisation: _____

Date	Program Name	Provider	Delivery Type	Accreditation Number	Accredited CPD Hours	Non Accredited CPD Hours	Professional Dimension	RG146	TPB Hours



Professional Dimension allocation checklist

<input type="checkbox"/> Capability	<ul style="list-style-type: none"> <input type="checkbox"/> Provides content on federal budgets, legislative changes, economic developments, investment products or facility an adviser is authorized to provide advice on <input type="checkbox"/> Designed to maintain, update and develop knowledge in the ASIC RG146 competencies <input type="checkbox"/> Includes variables impacting a client's financial strategy e.g. taxation, inflation, currency, financial markets etc <input type="checkbox"/> Covers elements of practice management including starting a practice, running a practice and succession planning
<input type="checkbox"/> Professional Conduct	<ul style="list-style-type: none"> <input type="checkbox"/> Covers FPA Code of Professional Practice including Code of Ethics, FPA Rules of Professional Conduct and FPA Guidance <input type="checkbox"/> Covers compliance obligations, compliance audit requirements and/or similar <input type="checkbox"/> Covers complaints management, conflicts of interest, dispute resolution <input type="checkbox"/> Examines ethical theories, dilemmas and practices
<input type="checkbox"/> Critical Thinking	<ul style="list-style-type: none"> <input type="checkbox"/> Looks at how to apply technical capabilities to specific client situations disclosed in the fact find <input type="checkbox"/> Teaches how to analyse and articulate advantages, disadvantages and risks with strategy <input type="checkbox"/> Develops strategic advice skills and developing alternative and appropriate solutions to meet the clients objectives <input type="checkbox"/> Looks at analysing a client's tolerance to risk <input type="checkbox"/> Develops skills to analyse and compare products (research)
<input type="checkbox"/> Reflective Practice	<ul style="list-style-type: none"> <input type="checkbox"/> Looks at an individual's personal development needs e.g. development and review of a comprehensive professional development plan. <input type="checkbox"/> Covers critical self awareness through self reflection and analysis of individual capacity and development needs to improve professional practice <input type="checkbox"/> The program gives personal targeted feedback on an individual's traits and performance (e.g. Myers Briggs)
<input type="checkbox"/> Interdependence	<ul style="list-style-type: none"> <input type="checkbox"/> The program covers structured mentoring <input type="checkbox"/> The program has been developed by a planner for delivery to the wider community <input type="checkbox"/> The program involves pro-bono work <input type="checkbox"/> The program requires engagement with the FPA through committees and chapters
<input type="checkbox"/> Attributes and Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The program develops interpersonal skills such as communication (verbal and written), presenting, negotiation, building rapport, leadership, time management and influencing etc. <input type="checkbox"/> The program covers some aspects of managing a practice i.e. positioning self and services, fee for service modeling, creating value propositions, marketing strategy for services offered.