



CPD RECORD: TRUSTEE CHARITY ENGLAND & WALES EXAMPLE

As part of your Annual Return, ICAS ask you to self-certify that you have met your CPD requirements for that year through undertaking 'The ICAS Professional Development Process'. This process is something that you will probably be doing to some extent anyway, either mentally or as part of your organisation's annual performance review process.

If selected for monitoring purposes, you will be asked to send in your CPD record for review by ICAS. Your CPD record can be in any format but we recommend this pro-forma CPD planning and recording document to help you plan your CPD activities and record your progression through ICAS' Professional Development Process. A copy of this document is also available from the ICAS website [here](#)

Personal Details

Full Name <i>Mr John Good</i>	Membership ID <i>MXXXXX</i>
CPD YEAR : 2025	

STEP 1- Define current and future role(s)

What is expected of you in your current role?

You may like to consider the expectations being placed upon you by employers, clients, colleagues, regulators and the public, and your ethical obligations to them. Consideration can be given to your future career options and goals.

I retired from full time work five years ago but am Trustee to four large charities. I receive no remuneration or expenses for these roles.

STEP 2 – Decide on your training and development needs

What skills and knowledge do you need to maintain or develop to meet these expectations and what training gaps have you identified as a result? This could include personal as well as technical skills, especially if you manage others.

You are encouraged to carry out this assessment at the start of the year but this assessment is expected to be ongoing to take into account any changes in role, organisation or business environment.

- *Keep up to date with financial, charity and regulatory matters*
- *Provide sound financial guidance to the charity, to act in the 'public interest' and act ethically*

STEP 3- Identifying CPD activities

How will you address your development needs? You are encouraged to use this section of the record to diary or list the CPD activities you are aiming to undertake throughout the year.

A wide range of activities can be recognised for CPD purposes and is recommended. If you can identify a

You are required to keep a copy of this record for three years.

meaningful learning outcome from a particular activity then it will be valid for CPD purposes

- *Attend all trustee meetings & meetings with external auditors & investment managers*
- *Regular review of The Charity Commission and ICAS website for regulatory developments, including the SORP and Guidance for trustees, & completion of the Annual Return*
- *Reading CC News, CA magazine and business press*
- *Attend charity seminar run by accountancy firm each year*

STEP 4 – Reflect and Record

This section of the record should be used to record when you have undertaken a CPD activity.

For each activity, what were the key learning points? How have you applied them? How do they address your needs listed in Step 2?

	Date		Activity	Outcome
Date added	completed			
7/1/2025	10/12/2025	<input type="checkbox"/>	Quarterly trustee meetings, meet auditors & investment managers	Learned about fundraising activities; charity risk assessment, audit findings & investment results and targets
7/1/2025	10/12/2025	<input type="checkbox"/>	Regular review of The Charity Commission and ICAS website	I reviewed the website twice this year to keep up to date with regulatory developments SORP & completion of the Annual Return
7/1/2025	10/12/2025	<input type="checkbox"/>	Reading CC News, CA magazine & business press	Kept up to date with topical business and charity issues
30/4/2025	6/5/2025	<input type="checkbox"/>	Attend charity seminar	This seminar was very helpful in ensuring I kept up to date with charitable requirements

In summary, what were the most important things you learned last year? What were the tangible outcomes of these for your business?

The CPD above ensured that I kept up to date with all regulatory, technical and ethical developments and I found the meetings with our auditors particularly useful in helping to identify key risks for the charities. I also found the seminar particularly useful in helping me keep up to date with the most recent regulatory and ethical considerations for charities. .