IPA
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IPA CPD Gold Accreditation: A guide to submitting

For 2023 Accreditation

What is CPD Gold Accreditation?

The IPA CPD Gold Accreditation scheme recognises and rewards member agencies who demonstrate a genuine and effective culture of learning, bettering the professionalism, skillset and reputation of the industry, enhancing clients' brands and agencies' worth as a result. When IPA President, Josh Krichefski, launched his People First agenda in 2023 he said: ***"We don't have factories, trucks, manufactured goods. Our people are everything. It's their brilliance and imagination which is what makes us who and what we are. And that's why we have to look after them."*** CPD Gold requires agencies to not only show that they ensure their people are skilled, included, and well, but that doing so is a business imperative.

When submitting for CPD Gold Accreditation, agencies must demonstrate that continuous professional development lies at the heart of their business. The submission should evidence a strong and innovative culture of professional development that supports real business objectives, and the development of employees.

Crucially, the submission needs to demonstrate that CPD contributes to business success.

How to submit

1. Using the template in Appendix 1, write a CPD Gold paper, outlining how you have met the 10 Gold criteria. You **must** use this template to write your entry. Make your submission for CPD Standard **AND** Gold Accreditation via your CPD Dashboard by **5pm, Tuesday 7 February 2024**. Submit only a PDF of your Strategic Development Evaluation for CPD Standard, and your complete CPD Gold paper, in the format of a single PDF file, for CPD Gold.
2. Remember to include all necessary appendices, e.g. appraisal form, induction documents, in your single PDF file.

Suggested next steps

1. Gather a team and assign roles.
2. Attend a Gold workshop or webinar, start drafting, and start working out what you can improve. You're encouraged to begin drafting by November 2023.
3. Complete the Evaluating Training module before submitting.
4. If your agency has multiple agency brands/locations and you would like to make a network or group submission, ensure you contact the IPA to discuss the options available.
5. Contact the IPA CPD Adviser, Gwyn March, to arrange support. Gwyn can give you four free hours of consultancy time to discuss your submission, and can also read and feedback on up to **two** drafts/excerpts of your submission. Please adhere to these limits.
6. Look at the key criteria checklist:
   - Strategic Development Evaluation
   - Appraisal form, format and dates for each individual/screenshot of agency appraisal completion
   - Welcome pack
   - Proof of CPD hours completed per person (A screenshot of agency CPD diary completion and/or anonymised records of CPD hours per employee, and a summary of completion)
   - Welcome pack
   - 15% completion of LegRegs Essentials Certificate, Commercial Essentials Certificate, Effectiveness Essentials Certificate The agency can decide how this 15% is allocated, e.g. 5% LegRegs, 6% Commercial, 4% Effectiveness. (Include screenshot of agency completion from IPA CPD Dashboard)
   - Evidence of evaluation methods e.g. feedback forms, testimonials of use of learning, ROI
   - Agency survey data (If available)
   - Clarity on senior management involvement

The marking scheme

Marks are allocated as follows:
CPD Culture: 50%

CPD Effectiveness: 30%

CPD Innovation: 20%

Please also note that you can receive marks in more than one category for your CPD

Things to remember

- Let the IPA know as early as possible that you are planning to submit for CPD Gold, there is plenty of support available – including free workshops and mentoring.
- The submission does not have a maximum word limit, but you are strongly encouraged to write with **brevity and clarity.** If the main body of your submission exceeds 100 page (excluding appendices), you are advised to review it, and see if you can state your case more concisely. Before including a case study, think about which objective it supports, which criterion it meets, and how you can explain it succinctly to your assessor, who might read 10 - 15 submissions.
- Testimonials can provide rich and engaging detail on the effectiveness of learning, but you should include them mindfully. Ensure each testimonial is centred on objectives, action points, behaviour changes, and results. Consider including extra testimonials in the appendices - your assessor can always refer to them here if they need more information.
- Don't assume that you must have a big team and training budget. Some of the best CPD success stories come from low cost initiatives.
- Make sure you always come back to the business objectives, and how CPD supported them.
- Don't assume you will automatically fail if you're weak on one criterion. The panel values honesty and a plan to get back on track, You're encouraged to acknowledge any aspect of the criteria you struggled to achieve alongside, crucially, the corrective steps you took.
- You should focus more on content than design. Your submission needs to be coherent and professionally written, your priority should be the material about CPD culture and effectiveness, rather than the design.
- Think carefully about what counts as a metric of success. For example, high numbers of participants shows scale and efficiency of CPD, but not any contribution to a business goal. See Appendix 2: Principles of Measurement for more information on metrics.

Data and Privacy

Agencies should only include the minimum amount of personal data necessary to complete their submissions, if any. Please ensure that you do not include any special category data. Please ensure that your submission and presentation of data only reflects staff members who are currently employed by your organisation.

To see how the IPA deals with personal data, please visit **ipa.co.uk/privacy-policy.**

The CPD Gold Criteria

CONTINUOUS PROFESSIONAL DEVELOPMENT GOLD

Evidence of a strong CPD Culture: 50%

1. What evidence is there that there is an embedded CPD culture; and that CPD is seen as a tool of business success?

Is it clear that CPD lies at the heart of the business, and that senior management regard it as a vehicle of commercial success?

Key indicators of success in this criteria are:

- Thoughtful measures of success, demonstrating where CPD contributed to the business and its performance. Consult Appendix 2 for examples of CPD effectiveness measurement and KPIs.
- Examples of senior management's involvement in CPD planning and implementation, demonstrating that the CPD Manager is not operating in isolation.
- Time and/or money are spent on CPD, with evidently diverse ways to learn and embed learning.
- Staff consultation and surveys on CPD polices such as training, on-boarding and appraisal process.
- Evaluation of CPD informs future business plans, via appraisals, for example.
- Evidence that the agency has a creative and futureproof approach to CPD, with effort made to understand and implement CPD plans that secure a broader digital skillset for example, or a diverse and inclusive workforce.
- Staff wellbeing measures are designed and implemented strategically, and evaluated against business objectives, e.g. sick day reduction, staff retention increases.
- Efforts made to increase and celebrate the agency's number of Accredited MIPAs.
- There is commitment to Diversity, Equity and Inclusion and Mental Health training. DE&I initiatives and Mental Health initiatives are embedded in the agency's learning culture, and contribute to a business objective, e.g. staff retention, staff engagement, client retention, creative productivity.
- The transformative role of CPD in the agency's DE&I journey is demonstrated.

If you would like to include social or CSR initiatives, always ensure you show how these activities include an element of learning, and, crucially, are related to a business goal. In order to be counted, they must tangibly and measurably have contributed to business success, e.g. staff engagement/retention, diversifying skill-sets etc. Before including such an initiative, ask yourself if it is designed to support your staff's development and their contribution to the business, or is it a perk/benefit?

2. Are development opportunities available to everyone in the agency, and do Senior Management participate?

Does everyone have access to some appropriate training, and is training well attended?

Key indicators of success in this criteria are:

- Management make efforts to continue their own professional development, they share their knowledge, they are part of the induction programmes, they are involved in CPD strategy, participate in appraisals and record their CPD hours.
- Inclusivity education opportunities extend beyond junior staff, and are supported and championed by senior leadership.
- Senior staff take part in mentoring, in house or via industry initiatives.
- CPD initiatives are in place for 'forgotten departments' e.g. office services, production.
- High levels of professional qualifications.
- Learning and development initiatives to support significant changes to the business are in place to ensure smooth business transitions, and safeguard staff wellbeing.

3. A comprehensive induction programme for all new joiners

Every new joiner should have some sort of planned induction, which communicates not only their new role, and what to expect, but the agency's culture.

Key indicators of success in this criteria are:

- Tailored programmes for graduates, apprentices, or emerging talent scheme.
- A "return to work" programme for those taking parental leave, or any other long term leave.
- The needs and wellbeing of hybrid workers are considered from the outset.
- The welcome programme should include staff from across the business – particularly senior management.
- A feedback system which informs ongoing improvements to inductions.
- CPD and its importance is introduced early in the new joiners' journey.
- High probation pass rate.

Please include induction programme documentation as an appendix.

4. A thorough appraisal system, with annual dates recorded in CPD Diaries or in-house records

All staff should have at least one opportunity annually to discuss their progress, with documentation, objectives, and action points. The appraisal can take any form that suits the agency's culture – from a group-wide system with a performance matrix, to an informal one-to-one with summary and agreed action points written up in an email.

Key indicators of success in this criteria are:

- Managers are provided with training, or at least guidance, on how to conduct motivational appraisals.
- Appraisals assess the effectiveness of learning, encouraging appraiser and appraised to discuss learning & development completed and how it is being used.
- The appraisal process includes some method of assessing staff wellbeing as well as performance.
- Once annually is the minimum requirement, but please include information about more frequent performance reviews if applicable.

If you *do not* use the IPA diary system, please include proof of recorded appraisal dates for all staff in your appendix. A contextual summary of completion is also helpful, e.g, percentage of headcount who had an appraisal.

If you do use the IPA diary system, please be aware that your assessor does not have access to your CPD dashboard, so please include a screen shot of your appraisal completion rate from your agency's CPD dashboard. Please note if you use the IPA diary system for hours, you must use the diary system to capture your appraisal dates as well.

5. Maintenance of individual CPD diaries demonstrating a minimum 24 hours (or pro rata) of development activity

Has everyone at the agency completed their required CPD hours?

Key indicators of success in this criteria are:

- 100% of staff meeting or exceeding 24 hours of CPD person, or pro rata. The industry average is 37 hours.
- Testimonials to show that the CPD diary has been completed by the individual, and that they value the process.
- Testimonials on how learning has been applied to the business.

If you *do not* use the IPA diary system, please include records showing CPD hours completed per staff member in your appendix. A contextual summary of completion is also helpful, e.g, percentage of headcount who met their CPD hours requirement. Averages or sum total hours across the agency will not meet the criteria.

If you do use the IPA diary system, please be aware that your assessor does not have access to your CPD dashboard, so please include a screenshot of your CPD hours completion rate from your agency's CPD dashboard. Please note if you use the IPA diary system for hours, you must use the diary system to capture your appraisal dates as well.

6. 15% of the agency must have a mandatory free qualification; LegRegs Essentials Certificate, Commercial Essentials Certificate, Effectiveness Essentials Certificate.

The agency can decide how this 15% is allocated, e.g. 5% LegRegs, 6% Commercial, 4% Effectiveness. The IPA highly recommends LegRegs for staff in all agencies (creative or media) that are involved in any form of content creation for clients.

Key indicators of success in this criteria are:

- Clever or generous ways of encouraging uptake of the three qualifications, e.g. study groups or study leave.
- Encouraging uptake in other departments, not just account management, e.g. Production.
- Clear management support for the learning.
- Testimonials demonstrating application of the knowledge.

Please be aware, your assessor does not have access to your CPD Dashboard, so please include a screenshot of your completion rate from your agency's CPD Dashboard.

Effectiveness: 30%

7. Do the Strategic Development Plan and Evaluation demonstrate that CPD has a role in business success, and that there are methods to be sure it has contributed in some way?

The Strategic Development Plan and Evaluation are the foundations of the submission, they allow you to demonstrate the part professional development plays in business success, and how such success will be measured.

Key indicators of success in this criteria are:

- A Strategic Development Plan, identifying business objectives and opportunities for CPD, is submitted to the IPA in Spring/Summer 2023.
- A Strategic Development Evaluation, summarising and reviewing the year's L&D, is included prominently in the Gold submission.
- The business goals are specific, ideally measurable, including YoY success metrics, and related to business performance, not HR requirements.
- Clarity on who is receiving what development and why.
- Success is measured by business metrics such as staff retention or pitch wins, not by L&D/HR metrics such as numbers attending or how they rated the learning.
- Business objectives are robust, and KPIs are financial, wherever possible. L&D initiatives actively contribute to a financial saving to the business, and/or ROI calculations are shown.

Please note: Repetition of goals year on year, and inclusion of long term CPD measures are more than acceptable.

8. How well does the submission prove that CPD contributed to the business need it was designed to help?
Are you able to examine the objectives from the Strategic Development Plan and provide evidence that CPD efforts had a positive impact on the business?

CPD will not be the only reason for business success, but you should be able to evidence that it contributed. You should take a sensible decision about what can be justified, and exemplify the return on your CPD investment through case studies, testimonials, and evaluation.

It is not sufficient to show that the agency had excellent CPD and had a good business year, strong links between the two must be established and evidenced.

Examples:

1. Your agency's staff retention has significantly improved YoY, and as a result, has saved £50,000 in recruitment costs. You feel that the CPD must have made a contribution as you invested heavily in training and mentoring for the planning and creative teams, which previously saw the bulk of the turnover. The teams give great feedback, and their heads of department report they are more committed and engaged. There are no other factors, such as pay rises. You decide that 20% of the recruitment savings can be attributed to this CPD, and calculate an ROI.

2. The agency wins a new client, worth £1 million. All stages of the pitch were staffed by employees who attended AAR training, Pitch in a Day Workshops and YouTube Creative Essentials training. Testimonials from the staff detail how the training improved their confidence and skillset. Testimonials from the new client show that the pitch was won by the enthusiastic presentation of innovative ideas, especially the extensive knowledge of YouTube. You decide that 20% of the new business can be attributed to this CPD, and calculate an ROI.

Key indicators of success in this criteria are:

- Someone at the agency has taken the IPA's free online module in Evaluating Training.
- Submission authors can demonstrate their understanding of the Kirkpatrick Levels of Evaluation: Reaction, Learning, Behaviour and ROI (See Evaluating Training resources, and Appendix 2).
- Well-chosen and concise testimonials and case studies on use of the learning, and the business results.
- ROIs formed by dividing benefits by costs and taking a sensible view on the percentage contribution that the training has made to the benefits.
- Client feedback on the levels of knowledge and expertise at the agency, particularly if they can comment on an improvement or difference since previous projects.
- Staff survey or exit interview feedback that prove CPD is valued and has an impact on staff retention.

You are advised to start thinking about evaluation early. For example, the most effective case studies will assess the impact of the L&D by looking at performance pre and post.

Make practical decisions about what can reasonably be evaluated, for example Lunch & Learn sessions will rarely render an ROI, but large scale programmes such as MBAs or leadership workshops should produce results that can be evaluated at all four levels.

Don't be hesitant to include more recent initiatives that haven't yet yielded a measurable return on investment, or training where the results are not easily measured. Think of other ways you can show how the L&D has impacted the business and the individual, such as testimonials from the learner, or feedback from line managers and clients.

Innovation: 20%

9. How innovative is your agency's approach to CPD?
Has the CPD been implemented in a clever way? What can your submission teach the industry about successful CPD? What do you do that is unique or noteworthy? The best way to address this criteria is to talk about the initiatives of which you are most proud.

Key indicators of success in this criteria are:
- Motivational and creative marketing of in-house training, worthy of a creative industry.
- Low cost but innovative solutions to common problems. For example, skill sharing with clients.
- Initiatives known to be difficult achieve, e.g. international placement schemes, are executed successfully.

10. Is the submission coherent, professional, entertaining and interesting?
Is the story of how the development activity benefited the business well told and professionally presented?

Key indicators of success in this criteria are:
- Adhering to the mandatory structure, see Appendix 1.
- Page numbers, contents page, clear appendices.
- Thorough proof reading and sense checking.
- The required documents– appraisal format, induction programme, CPD records – are not only included but easy to navigate.
- Photographs to demonstrate the agency's culture, and to illustrate to stories of CPD success.

Please note: marks in this category are not awarded for design, but for coherence, professionalism, and quality of the written content. Marks can be deducted for typographic errors, disjointed writing and failure to adhere to the mandatory structure. Please ensure you leave enough time for thorough proofreading.

Appendices

Appendix 1

You must use this structure for your CPD Gold submission

1. Foreword introducing CPD culture and its role in business success
2. Contents page (page numbers throughout)
3. Strategic Development Evaluation (see Criterion 7)

Follow steps 4-6 for each business goal

4. Identify and contextualise Business Goal - explain why this is a business goal for the agency
5. How CPD was designed to help this business goal – overall theme and detail of key programmes, who activity was designed for
6. How we can prove CPD contributed in some way to the success of the business goal, for each key CPD activity show evaluation as appropriate

CPD Activity A

Kirkpatrick Level One – Reaction

Kirkpatrick Level Two – Learning

Kirkpatrick Level Three – Behaviour

Kirkpatrick Level Four – Results

Repeat for each activity as appropriate, explaining what type of evaluation method was used

Repeat stages 4-6 until Strategic Development Evaluation is complete.

If not covered as CPD activities already please make sure you include:

7. Induction programme (see Criterion 3)
8. Appraisal programme and dates (see Criterion 4)
9. Proof that staff met their required CPD hours (see Criterion 5)
10. Detail of mandatory qualifications – LegRegs Essentials Certificate, Commercial Essentials Certificate, Effectiveness Essentials Certificate– and policies to increase uptake (see Criterion 6)
11. Management Summary (and thoughts for the future)
12. Appendices to supports points 1-11

Appendix 2

Principles of Measurement
Measurements should contain proof of link of cause and effect. Remember, your goal is to illustrate the impact of the training – establish the connection between the business performance, e.g. pitch win, and the skills learned, e.g. pitch staffed by those who went on new business course.

Examples of common measurements:

1. Staff Survey
Positive scores and YoY change in the following categories:
- Leadership
- View of company and engagement
- Personal value
- Manager
- Learning
- Inclusivity

2. Staff retention/turnover
- Percentage total, and YoY change (a breakdown of staff turnover is encouraged, e.g. specify voluntary and non-voluntary churn)
- Probation pass rate, and YoY change
- Number of internal promotions
- Improvements in absence due to sickness
- Diverse representation and retention at senior level

3. Client retention
- Percentage total and YoY change

4. Client Feedback
- Positive scores and YoY change

5. New Business
- Number of wins
- Pitch conversion rate

6. Organic Growth
- Percentage growth

7. Digital
- Percentage growth in digital or diverse media, e.g. dynamic OOH, and YoY change

8. Awards
- Total number won, with awards named and listed

9. Finance
- Any savings following commercial upskilling e.g. on debt reclamation

10. Revenue
- Percentage increase and YoY change