

Professional Development Plan Guidance Document

Introduction

Each supervision agreement must contain a professional development plan (PDP).

The PDP must reflect the provisional licence holder's individual learning needs, which will be completed with their supervisor's input. These learning needs will be reviewed with the supervisor during supervision meetings. The supervisor must sign off each learning need once it has been achieved.

If an updated/ amended supervision agreement is submitted to the Registrar for approval, it is expected that it includes any achieved learning needs, which have been signed off by the supervisor.

If a provisional licence holder and supervisor decide to terminate supervision arrangements, the parties should ensure that the professional development plan is updated accordingly and retained with their supervision records (including minutes, list of client files, approved supervision agreement). The Registrar may require either party produce these records for inspection, per section 57 of the Immigration Advisers Licensing Act 2007.

Developing a PDP

The PDP should be agreed in consultation with the proposed supervisor. The discussions could include the provisional licence holder's goals and objectives, which they aim to achieve during their period of practising under supervision.

Some questions to consider, which may assist the provisional licence holder and their supervisor in developing a PDP, may include:

- *What are the priority areas for the provisional licence holder's practice? E.g. developing templates, setting up a business account, client file management.*
- *What knowledge and skills does the provisional licence holder already have?*
- *What knowledge and skills need further improvement in order to develop the skills and competencies required of a full licence holder?*

Below are some examples:

Learning needs	Agreed Activities	Date achieved	Supervisor sign-off
Maintain a compliant CPD plan and record	Supervisor and provisional licence holder to continually review CPD plan and record to see if PLH is on the right track for this years' licensing period.		

<p>Develop clear and understandable written agreements for my clients</p>	<p>Watch IAA webinar on written agreements and discuss content with my supervisor</p> <p><i>AND/OR</i></p> <p>Discuss my existing written agreement templates with my supervisor and assess compliance with Clause 19 of the Code. Amend templates accordingly</p> <p><i>AND/OR</i></p> <p>Attend [<i>insert name of relevant course</i>] and discuss what I have learned with my supervisor</p>		
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PDP v CPD

The PDP forms part of supervision records and may be inspected independent of an adviser's CPD plan and record. It is therefore important that a provisional licence holder maintains both records independently.

The difference between a PDP and CPD plan (and record) are outlined below:

PDP	CPD plan
<ul style="list-style-type: none"> • A PDP is only applicable to provisional licence holders. • The PDP is submitted in advance and is approved with the provisional licence holder's supervision agreement. • All provisional licence holders must have PDP plan included or attached to their proposed supervision agreement. • The PDP identifies learning needs of the provisional licence holder so they can achieve competency of a full licence holder. 	<ul style="list-style-type: none"> • A CPD plan and record must be maintained by all licensed immigration adviser for each licensing period. • The Authority does not require advisers to submit their CPD plan for the year ahead for inspection/ approval. Instead, if required, we 'look back' at the previous licence year (or up to three years if needed) and what activities they have undertaken to address their continuing learning needs. • Provisional licence holders may 'copy' their PDP plan into their CPD plan. However, a provisional

- The PDP identifies a provisional licence holder's learning needs to be undertaken with their Supervisor's input during the provisional licence period. Learning needs will be signed off as they are achieved. A provisional licence holder may submit an amended agreement including an updated PDP with their licence renewal.

license holder must also be aware of the relevant CPD record/ verification requirements if they take this approach.

- CPD plan identifies the **potential** areas of learning for the year ahead. It is not required to be approved by the Registrar. It may be developed in general terms and can be flexible. Amendments may be made during the relevant licensing period.