

Organisations applying to the ACCA Approved Employer programme are assessed against a number of best practice learning and development statements. Please indicate, by marking a cross (X), the best practice training statements your organisation can meet for the stream of approval you are applying for, as indicated in Part 4 of this form.

Some of the training statements are supported by definitions. These are represented by lower case letters (a) – (f). These definitions are included in the section entitled 'Information to Assist Matrix Completion' opposite.

		PRINCIPLE 1 – Development needs are identified	PRINCIPLE 2 – Development opportunities are provided	PRINCIPLE 3 – Development activity is monitored	PRINCIPLE 4 – Individuals are appraised and development needs reassessed
<p><b>PRE-MEMBERSHIP – TRAINEE DEVELOPMENT</b> There are three levels of approval available for the Trainee Development stream. Please complete the best practice learning and development statements in numerical order. For each level of approval granted, your organisation must be able to meet all the statements at that level as follows:</p> <p>Silver level: Statements 1–10 inclusive Gold level: Statements 1–20 inclusive Platinum level: Statements 1–27 inclusive</p>	Platinum	(21) Trainees' objectives are linked to organisational or departmental objectives. <input checked="" type="checkbox"/> (22) Trainees prepare and agree development plans. <input checked="" type="checkbox"/>	(23) Trainees are provided with "full support" to undertake study programmes and sit exams (d). <input checked="" type="checkbox"/> (24) Trainees are provided with opportunities to meet their development needs. <input checked="" type="checkbox"/>	(25) Trainees can demonstrate they have undertaken development activities. <input checked="" type="checkbox"/> (26) Trainees' development activities are monitored. <input checked="" type="checkbox"/>	(27) Trainees' development needs are reassessed at least once every 12 months. <input checked="" type="checkbox"/>
	Gold	(11) Organisational or departmental objectives are identified. <input checked="" type="checkbox"/> (12) Trainees understand how they contribute to organisational or departmental objectives. <input checked="" type="checkbox"/>	(13) Trainees are provided with "active support" to undertake study programmes and sit exams (c). <input checked="" type="checkbox"/> (14) Trainees are provided with paid leave (in addition to annual leave and national holidays) to sit exams. <input checked="" type="checkbox"/> (15) Clear written policy guidelines explain the study support available. <input checked="" type="checkbox"/> (16) Trainees are provided with work experience which fully meets the practical training requirements for ACCA's qualifications (a). <input checked="" type="checkbox"/>	(17) Trainees' progress in studies and exams is monitored. <input checked="" type="checkbox"/> (18) Trainees' performance in the workplace is monitored. <input checked="" type="checkbox"/>	(19) Trainees' progress in studies and exams is evaluated and appropriate action taken. <input checked="" type="checkbox"/> (20) Trainees' progress towards fully meeting the practical experience requirements (PER) for ACCA's qualification (a) is evaluated and appropriate action taken at least once every 12 months. <input checked="" type="checkbox"/>
	Silver	(1) Trainees and Workplace Mentors understand their role and responsibilities in relation to studying and training for ACCA's qualification. <input checked="" type="checkbox"/> (2) Trainees' objectives are set as part of a performance review. <input checked="" type="checkbox"/> (3) Opportunities to obtain appropriate practical work experience for ACCA's qualifications are identified (a). <input checked="" type="checkbox"/>	(4) Trainees are provided with leave (in addition to annual leave and national holidays) to sit exams. <input checked="" type="checkbox"/> (5) The nature and extent of the study support available is explained to Trainees. <input checked="" type="checkbox"/> (6) Trainees are provided with practical experience which can be counted towards the practical requirements (PER) for ACCA's qualifications (a). <input checked="" type="checkbox"/>	(7) Workplace Mentors review the practical experience gained by the trainee at least once every 12 months (a). <input checked="" type="checkbox"/> (8) The review of practical experience gained is documented (a). <input checked="" type="checkbox"/> (9) Workplace Mentors are qualified accountants (b) or the individual with overall responsibility for ACCA practical experience is a qualified accountant. <input checked="" type="checkbox"/>	(10) Trainees' objectives are re-assessed at least once every 12 months as part of a performance review. <input checked="" type="checkbox"/>
<p><b>POST-MEMBERSHIP – PRACTISING CERTIFICATE DEVELOPMENT</b> Your organisation must be able to meet learning and development statements 28–35. Organisations applying to the Practising Certificate Development stream will additionally be granted registration for Trainee Development status. This is a requirement of the programme.</p> <p>As such, your organisation is also required to indicate the learning and development statements it meets for the Trainee Development stream (statements 1–27).</p> <p>Your organisation must be able to meet Silver level statements 1–10 as this is our minimum benchmark for approval.</p>	Practising Certificate	(28) Members, principals (e) and authorised supervisors (f) understand their role and responsibilities in relation to training for ACCA's practising certificates. <input checked="" type="checkbox"/> (29) Members' objectives are set as part of a performance review. <input checked="" type="checkbox"/> (30) Opportunities to obtain appropriate practical work experience for ACCA's practising certificates are identified. <input checked="" type="checkbox"/>	(31) Members are provided with work experience which can be counted towards the practical training requirements for ACCA's practising certificates. <input checked="" type="checkbox"/>	(32) Members are required to complete an ACCA training record at least once every 6 months. <input checked="" type="checkbox"/> (33) Principals (e) or authorised supervisors (f) review and verify ACCA training records at least once every 6 months. <input checked="" type="checkbox"/> (34) Principals (e) and authorised supervisors (f) are qualified accountants and eligible to act in this position. <input checked="" type="checkbox"/>	(35) Members' objectives are re-assessed at least once every 6 months as part of a performance review. <input checked="" type="checkbox"/>
<p><b>POST MEMBERSHIP – PROFESSIONAL DEVELOPMENT</b> Your organisation must be able to meet training statements A–K.</p>	CPD	(A) Members understand their role and responsibilities. <input checked="" type="checkbox"/> (B) Members' objectives are set as part of a performance review. <input checked="" type="checkbox"/> (C) Members understand how they contribute to organisation objectives. <input checked="" type="checkbox"/> (D) Members prepare and agree development plans. <input checked="" type="checkbox"/>	(E) The organisation commits resources which enable members to effectively develop in line with their development plans. <input checked="" type="checkbox"/> (F) Members are encouraged to develop. <input checked="" type="checkbox"/>	(G) Members can demonstrate that they have undertaken development activities. <input checked="" type="checkbox"/> (H) Senior management monitor the development of staff. <input checked="" type="checkbox"/>	(I) Members develop in accordance with their development plan. <input checked="" type="checkbox"/> (J) Members' development needs are reassessed at least annually. <input checked="" type="checkbox"/> (K) Actions are taken if development activity is not sufficient/effective. <input checked="" type="checkbox"/>