



INSTITUTE OF BANKERS IN SOUTH AFRICA (IOBSA)

Continuous Professional Development (CPD) Application for Corporate Institutions and Private Providers.

APPLICATION FORM:

The application form is divided as follows:

Section A	Company information
Section B	CPD approval format
Section C	Required program information and documentation
Section D	Costs
Section E	Standard conditions in the agreement
Section F	Company Documentation Required

SECTION A: COMPANY INFORMATION

Legal name of provider or company and registration number			
Trading name of provider or company		Vat number:	

Authorized contact person	Name:	
	E-Mail:	
	Cell Phone:	
	Telephone:	
	Position in Provider/Company:	
Alternative contact	Name:	
	E-Mail:	
	Cell Phone:	
	Telephone:	
	Position in Provider/Company:	
Type of business	Professional Body	
	Corporate	
	University	
	Accredited training provider	
	Private company	
	Partnership	
	Other:	Description

SETA/QCTO/Dept. of Higher Education accreditation (if applicable)	
Physical address of Head Office or Main Office	
Postal Address:	
Web address	

SECTION B: CPD APPROVAL FORMAT PER EVENT

	Learning event (1)	Description
1.	Title and brief description of the CPD event	
2.	Summary of event <i>(Provide brochures if available)</i>	
3.	Provide outcomes of programme <i>(Via separate document)</i>	

4.	Delivery medium (seminar, facilitated session, online training, etc.)	
5.	Speaker information – attach cv's (Via separate documents)	
6.	Duration of the event	
7.	Fee charged for the event (not applicable to in house training)	
8.	Assessment process (Where relevant – description of methods and tools)	Case Study / Presentation / Group discussions/Assignment

SECTION C: REQUIRED DOCUMENTATION

Event Specific Documentation (Evidence for reporting):

Type of activity	Supporting documentation required:
CPD events:	<ul style="list-style-type: none"> • Outline of topics being presented • Copies of reviews required • Agenda of programme including- Presenters/Facilitators (including summary CV/qualifications and experience) • Attendance register
Formal workshops/ training sessions	<ul style="list-style-type: none"> • Session times, topics and presenters • Reviews
	<ul style="list-style-type: none"> • Presenters/Facilitators: summary CV/qualifications and experience • Attendance registers

Conferences	<ul style="list-style-type: none"> • Session times, topics and presenters • Copies of reviews required • Attendance registers
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(Examples to be submitted)

Copies of:	Attached
Format of CPD programme (Example of Agenda)	
Template of Attendance register	
Template of learner evaluation form	

SECTION D: COSTS FOR OFFICE USE ONLY

Contact time	Fee for approval

SECTION E: STANDARD CONDITIONS IN THE AGREEMENT

- All agreements are effective for 12 months. The agreement can be annually renewed at the option of IOBSA. Application for renewal must be submitted 1 month prior to expiry. All renewals of agreements will be subject to the formal endorsement process and criteria as detailed above;
- All risks associated with any CPD session or hosting of the event such as unpaid fees and cancellation of a scheduled course or event at short notice, for whatever reason, will be borne by the training provider or the applicant, and not the IOBSA.
- Evaluations must be conducted after each CPD intervention and provided to IOBSA within two weeks of the CPD session. The IOBSA may recommend remedial action and require relevant proof if applicable.
- All application fees must be received before the organisation will be recorded and advertised on the approved provider list for IOBSA CPD endorsement.
- Standard breach of contract clause applies.

I, (Name and Surname) duly representing,

_____ (Organisation Name) agree to the terms and conditions

stipulated in this agreement.

Date: _____ Place: _____

Signature: _____

SECTION F: COMPANY DOCUMENTATION REQUIRED

- CIPC Certificate/ CC Documentation
- ID copies of Directors/members
- Company Letterhead
- VAT registration number