



Relevant Practical Experience

Training Planner

May 2024



ICAS

Consultation

Response

March 2023

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# Relevant Practical Experience Training Planner

As part of the Authorised Training Office (ATO) application process, you need to demonstrate how you’ll meet the Relevant Practical Experience (RPE) requirements of the CA qualification.

You should read the guidance, complete the training planner and return it to us alongside your application form.

Guide to completing the training planner

The following information needs to be summarised for each section of the planner.

### Relevant Practical Experience

**Competencies summary**

Provide a summary for each timeline of how the competencies will be achieved, including any examples of the opportunities that students will have to achieve the skills in the workplace.

For example, for Communications (T.2):

* Given encouragement to approach and communicate openly with colleagues and clients with guidance where required for written material.
* Participate in weekly team meetings and given encouragement to give input and views.
* Regular constructive feedback on behaviours and learning points.
* Present different opinions or question senior colleagues.

Students must be able to demonstrate the required level of knowledge and skill on a task before they move on to the next competency.

### Workplace

**Area of work**

Provide an expected area of work relating to Accountancy, Financial or Audit, including an overview of the main business activities.

For example, students working predominantly in the finance team or functions within that team include, but are not limited to:

* Invoice processing
* Profile and Loss (P&L) calculations
* Reconciliation of assets/liabilities and P&L to external parties
* Coordination with internal stakeholders within the Investment, Compliance, Legal, Risk and Treasury teams
* Overseeing the yearly fund audit with the organisation’s external auditor
* Vendor relationship management
* Improvements to processes and systems

**Timescale**

Provide the intended arrangement for the six timelines and 39 competencies required to be completed over the student’s training period, including a breakdown of each of the student’s training year.

For example:

* Ethics and Integrity (Timeline 1) and Personal Effectiveness (Timeline 4) competencies will be completed in year one of the training period.
* Teamwork and Leadership (Timeline 3) and Problem Solving and Decision Making (Timeline 2) will be completed in year two of the training period.
* Communications (Timeline 2) and Technical Competence (Timeline 6) will be completed in year three of the training period.

### Training structure

**Training, Monitoring, Coaching and Evaluation**

Map the competency examples and summarise the overall learning objectives for the timelines, describe what knowledge or skills students should gain as a result of the training.

* Provide summary of how the student will be appropriately supported, coached, and supervised throughout their training period.
* Provide details of how training for professional values and ethical attitudes for students will be provided.

For example, overall learning objectives could include:

* Yearly fund audit with the organisation’s external auditor – the student will be able to identify deficiencies in the accounting systems and control and be confident in which recommendations can be made to make the business more efficient.

**Evaluation**

Provide a summary of how the training will be evaluated for the student. This could include monthly progress meetings, appraisal meetings, quarterly reviews.

### Evidence

**Logbook**

Summarise the student requirements for accessing and evidencing their RPE in the logbook. Provide details on how often they will be required to engage with their logbook, how this will be monitored and how often the reviewer and counselling member will review the entries and sign off as applicable.

Relevant Practical Experience training planner

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Relevant Practical Experience (RPE) | | | Workplace | | |
| Timelines | | Competencies summary Provide a summary of how each of the timeline’s competencies will be achieved. | Area of work Expected area of work (Accountancy, Audit, Financial) | Timescale Timescale for completion |
| T.1 | Ethics and Integrity |  |  |  |
| T.2 | Communications |  |  |  |
| T.3 | Teamwork and Leadership |  |  |  |
| T.4 | Personal Effectiveness |  |  |  |
| T.5 | Problem Solving and Decision Making |  |  |  |
| T.6 | Technical Competence |  |  |  |
| Training Structure | | Provide how the training will be supported and evaluated for the student and summarise the overall learning objectives for the training period. | | |
| Training Monitoring, Coaching and Evaluation | |  | | |
| Learning Objectives | |  | | |
| **Evidence** | | Outline student requirements for entering their RPE in the Logbook system. | | |
| **Logbook** | |  | | |



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