



# INITIAL PROFESSIONAL DEVELOPMENT (IPD) **EXAMPLE STUDENT LOG** (partially completed)

For reference use only – to be used by students who are following the ICAEW IPD scheme

Name Mr John Smith

ACA student number 000000000



## Level 1: IPD Log

The student should enter a commentary assessing their own attainment in each of the major areas below. The reviewer, following a discussion with the student, should enter an agreed conclusion about the level of attainment of the student in the rightmost columns.

	Student's commentary	Reviewer's conclusion on attainment	
		Satisfactory	In need of development
<b>Ethics and Professionalism</b> Understanding the Code of Ethics and the role of a professional accountant and behaving accordingly, upholding professional standards and the public interest.			
<b>Ethics and personal conduct</b>	<p><i>My achievements during the first six months are:</i></p> <p><i>1 I have completed the first level of the ICAEW ethical package and completed the assignment for consideration at this review. This has helped to consolidate the information provided in my induction to the company during my first week of employment.</i></p> <p><i>2 Having dealt with confidential financial information, I understand the importance of maintaining client confidentiality at all times. It has become very clear that without retaining confidentiality, the relationship between the company and its clients will be severely affected.</i></p> <p><i>3 Having failed to ask for assistance on my second</i></p>	<p>John has demonstrated great professionalism during his first six months.</p> <p>His ethical level 1 assignment demonstrated his understanding of ethics and he has been signed off and he can move to</p>	<p>No development points</p> <p><b>A Counsellor (March 08)</b></p>

	<p><i>assignment, I now realise the impact it has on completing the task on time and to a standard required by the client.</i></p> <p><i>My developments during the second six months:</i></p> <p><i>1 I have continued to study the web package and will complete the level two assignments by the time of my 18 month review meeting.</i></p> <p><i>2 My knowledge and skills have increased enabling me to recognise problems and issues at an earlier stage and to seek appropriate help and guidance in a timely manner.</i></p>	<p>ethics level 2.</p> <p><b>A Counsellor (March 08)</b></p> <p>John demonstrated to the company his understanding of ethics by presenting to everyone a summary of level 1 of the ethics package.</p> <p><b>A Counsellor (Sept 08)</b></p>	
<p><b>Understanding of the profession</b></p>	<p><i>My achievements during the first six months are:</i></p> <p><i>1 I have joined the ICAEW Financial Reporting Faculty, which provides regular updates on global and UK issues.</i></p> <p><i>2 I have attended two student society meetings and intend to offer myself as a committee member in the next six months.</i></p> <p><i>3 From a number of meetings with clients, I have realised the importance of being professional. As an example, I sat in a meeting with a client led by a manager. She had to deal with an irate director who had a number of areas of concern. The manager kept calm and addressed each point with openness and honesty. A plan was then agreed addressing each point with an agreed timetable. The client</i></p>	<p>John has shown a desire to get involved with the ICAEW and this will benefit both the company and him.</p> <p><b>A Counsellor (March 08)</b></p> <p>I am extremely pleased with John's commitment and he has already</p>	<p>No development points</p> <p><b>A Counsellor (March 08)</b></p>

	<p><i>departed satisfied that everything had been resolved and has subsequently provided positive feedback on the service provided.</i></p> <p><i>My developments during the second six months:</i></p> <p><i>1 I am now a member of the Student Society Committee. This provides even more of an insight into the ICAEW and the profession.</i></p>	<p>demonstrated in the work place that he is operating at level 2.</p> <p><b>A Counsellor (Sept 08)</b></p>	
<p><b>Personal Effectiveness</b> Developing, maintaining and exercising the skills and personal attributes necessary for the role and responsibilities.</p>			
<p><b>Personal attributes and abilities</b></p>	<p><i>My achievements during the first six months are:</i></p> <p><i>1 I am learning to manage more than one task at a time. I quickly realised that I could not just concentrate on one given task. Each day, clients contact the company and I am asked to assist in urgent enquiries. The key skill I have learnt is to carefully record progress on every task in order that I can quickly pick up from where I left.</i></p> <p><i>2 My initial reluctance to ask for assistance has been improved. I realised that the vital issue was delivering quality to the clients and to do that I needed to recognise knowledge gaps and seek guidance.</i></p> <p><i>3 I understand the importance of managing work and study commitments. I have learnt to be flexible at work to meet clients' demands and if this requires overtime, then I plan ahead to replace any lost study</i></p>	<p>John has developed well during the first six months and I agree with all his achievements.</p> <p><b>A Counsellor (March 08)</b></p> <p>I am extremely pleased with John's development and he has already demonstrated in the work place that he is</p>	<p>John does tend to hold back and it suggests to others that he lacks confidence. He has lots of ability and in the next six months should push himself forward to express views during internal meetings.</p> <p><b>A Counsellor (March 08)</b></p>

	<p><i>time.</i></p> <p><i>My development point:</i></p> <p><i>1 I still need to gain greater confidence and be able to express my views during internal meetings.</i></p> <p><i>My developments during the second six months:</i></p> <p><i>1 I have continued to manage my work and study time effectively and passed all exams.</i></p> <p><i>2 I am able to work most of the time without significant amounts of supervision. I have achieved this by careful listening during briefings and reviews and learning from past mistakes. I now ask questions during the briefings to ensure my understanding is correct.</i></p> <p><i>3 I have gained confidence in face to face situations and gave a short presentation in an internal meeting.</i></p>	<p>operating at level 2.</p> <p><b>A Counsellor</b> <b>(Sept 08)</b></p>	<p>No further level 1 development points.</p> <p><b>A Counsellor</b> <b>(Sept 08)</b></p>
<p><b>Communication</b></p>	<p><i>My achievements during the first six months are:</i></p> <p><i>1 My communications in writing have developed during the six months. My initial verbose style has changed to a shorter style that provides more clarity for the reviewer.</i></p> <p><i>2 I have realised the importance of carefully listening in client briefing meetings. I know make relevant notes to ensure that I address areas properly.</i></p> <p><i>My development point:</i></p>	<p>John's self assessment is spot on.</p> <p><b>A Counsellor</b> <b>(March 08)</b></p> <p>John has demonstrated in a number of ways his confidence.</p> <p><b>A Counsellor</b></p>	<p>I will arrange for John to provide a short work based presentation during an internal meeting.</p> <p><b>A Counsellor</b> <b>(March 08)</b></p> <p>No further</p>

	<p>1 I still need to gain greater confidence on the telephone and in face to face client scenarios.</p> <p>My developments during the second six months:</p> <p>1 I consider my overall communication skills now demonstrate greater confidence with both the technical and client facing skills required in this job. This has been demonstrated on a number of assignments where I have gained positive feedback from my manager.</p>	(Sept 08)	<p>level 1 development points.</p> <p><b>A Counsellor</b></p> <p>(Sept 08)</p>
<b>Interpersonal skills</b>	<p>My achievements during the first six months are:</p> <p>1 I realise the importance of retaining an open mind. On my last assignment, the client was very demanding and it was important that I was flexible and able to relate to the client.</p> <p>2 I was conscious that I had to keep in close contact with my manager, in order that the demands from the client were within our actual brief, as defined at the pre assignment briefing meeting.</p> <p>My developments during the second six months:</p> <p>1 I am in demand with a number of managers, which I consider demonstrates my team commitment. This has arisen through my commitment to deliver quality for both the client and the company.</p>	<p>John's self assessment is spot on.</p> <p><b>A Counsellor</b></p> <p>(March 08)</p> <p>He is already demonstrating some of the level 2 skills.</p> <p><b>A Counsellor</b></p> <p>(Sept 08)</p>	<p>No development points</p> <p><b>A Counsellor</b></p> <p>(March 08)</p>

<b>Technical &amp; Functional Expertise</b> Developing, maintaining and exercising the technical knowledge and specialised skills necessary for the role and responsibilities.			
<b>Understanding and doing what is required at work</b>			
<b>Using IT applications</b>			
<b>Dealing with technical issues and problems</b>			
<b>Business Awareness</b> Being aware of the internal and external issues, pressures and influences that have an impact on the role, the employer and other stakeholders.			
<b>Personal skills</b>			
<b>Organisational skills</b>			
<b>Commerciality</b>			
<b>Professional Judgement</b> Recognising issues, weighing competing issues, assessing implications of decisions, making confident, ethical, commercially feasible decisions and recommendations.			
<b>Analysis</b>			
<b>Professional knowledge and skills</b>			
<b>Data gathering</b>			

Once completed, this checklist should be used by the reviewer to decide whether the student is ready to move up to the next level. If there are no areas in need of development at this level, then a move up to the next level is appropriate.

If there are still areas in need of development, the reviewer should use their professional judgement, depending upon the attainment of the student relative to their work role and the relative significance of the deficiencies. If a move up to the next level is agreed at this meeting, it would be appropriate to agree an action plan to remedy the remaining development needs and review progress after a relatively short time, for example three months.

<b>Move up to level 2</b>	Yes / No
<b>Action plan to deal with development needs and review date agreed</b>	Yes / N/A