



**CONTINUING PROFESSIONAL GROWTH  
PROGRAM**

**FOR**

**FCSI CONSULTANT MEMBERS**

**In FCSI - The Americas**

**Procedures Manual**

**December 12, 2019**

## I. Governing Authority

“The purpose of establishing a Continuing Professional Growth (CPG) Program for FCSI members, Professional, Senior Associate and Associate, is to elevate standards, enhance individual performance, and recognize those members who demonstrate knowledge essential to the highest professional level of consulting in the foodservice industry.

The Worldwide Board of Directors (WW BoD) directs the Worldwide Council for Professional Standards (CPS) to develop and monitor the CPG Program. The WW BoD approves and enforces the overall requirements and provisions of the CPG Program, and only the WW BoD may amend the CPG Program requirements and provisions as defined in this Policy Document. The WW BoD delegates to the CPS the responsibility of interpreting and implementing other requirements and provisions of the CPG Program as defined in a Procedures Manual.”<sup>1</sup>

The CPSTA developed its own CPG Procedures Manual FCSI-The Americas. CPSTA recognizes CPS’s work as a guideline to be adapted by each local unit based upon cultural differences as long as the adaptations do not conflict with the CPG Program Policy Document. CPSTA will review this document each year and make changes for the next year prior to its beginning.

## II. Overall Requirements

As stated in the CPG Policy Document, “All foodservice consultants engage in lifelong development to maintain and improve knowledge and skills for competent consulting. This includes continuous self-assessment to identify professional strengths and learning needs, establishment of short- and long-term goals for individual development, and selection of appropriate educational opportunities for which Continuing Educational Units (CEUs) are awarded to recognize achievement of these goals.

To maintain FCSI membership status, a Professional member must acquire a minimum of twelve (12) units of approved CEUs each year of their membership. All Senior Associate members are required to acquire a minimum of six (6) CEUs and Associate members are required to acquire a minimum of three (3) CEUs to maintain their membership status effective January 1, 2010.

Beginning in 2010 members who earn CEUs in excess of the required minimum yearly units may roll forward a portion of those units to the following year. Professional members may roll forward a maximum of six (6) CEUs, Senior Associate members may roll forward a maximum of three (3) CEUs and Associate members may roll forward a maximum of one (1) CEU to the following year. Such roll forward of excess CEUs must be requested by the member; no roll forward shall be automatic.”

CEUs are normally awarded on the following basis: one (1) hour of educational activity earns one (1) CEU. Numerous variances to this standard, however, are made in order to acknowledge

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<sup>1</sup> All quotations are from the CPG Program Policy Document approved by the Worldwide Board of Directors on March 17, 2010.

the intensity of the activity or to simplify the definition of acceptable activities. Specific limits are applied to certain types of activities within a year in order to broaden the professional growth of the consultant.

### **III. Continuing Education Units**

As stated in the CPG Policy Document, “In order for the CPG Program to enhance the status of FCSI, the learning opportunities for which CEUs are earned must apply to the field of foodservice and hospitality consulting, and the education must focus on activities other than the member’s specific job responsibilities.

CEUs are designed to accomplish the following goals:

- A. update and enhance knowledge and skills required for consulting at the FCSI Professional, Senior Associate and Associate membership levels;
- B. stimulate self-assessment of a member’s knowledge and skills;
- C. provide opportunities for interdisciplinary learning;
- D. provide opportunities for professional growth and development; and/or
- E. offer the client a better service and/or product.”

In order for educational endeavors to qualify for CEU credit toward FCSI’s CPG requirements, the specific **new learning** activities accomplished must support at least one (1) of these five (5) goals. When requesting the awarding of CEUs for a specific activity, the member has the burden of demonstrating that the activity is consistent with these goals.

The following are the types of continuing professional growth activities that qualify for CEUs:

- A. passing two exams as part of Professional Membership Process
- B. attending professional seminars
- C. preparing and delivering presentations
- D. authoring articles and books
- E. authoring reviews on software and books
- F. completing educational courses
- G. attending trade shows
- H. viewing educational video or multimedia self-study programs
- I. providing service to FCSI and/or other industry groups

The following sections describe the specifics for each type. A summary is also presented in Table 1 later in this document.

**A. Passing Two Exams as Part of Professional Membership Process**

Members may earn CEUs by passing two exams: the Industry Knowledge Exam (IKE) for twenty (20) CEUs and the Professional Skills Exam (PSE) for twenty (20) CEUs.

**B. Attending Professional Seminars**

Members attending professional educational seminars may request CEUs. The number of units is based on the duration of the seminars, with one (1) unit awarded per hour of

educational content. The duration must be at least thirty (30) minutes to qualify, thus earning one half (.5) CEUs.

As a service to members and program providers, FCSI notifies members of pre-approved educational seminars, with the awarding of CEUs automatic, subject to the required attendance verification. When a member, however, attends a seminar that is not pre-approved, the member must submit the seminar for approval to receive CEU credit.

FCSI Annual Worldwide and Division Conferences, as well as all Chapter programs, are typically pre-approved educational seminars. Using the Registration Packet as verification of attendance, FCSI - The Americas automatically awards consultant members the appropriate number of CEUs.

This category includes tours of manufacturer's facilities. Up to one CEU is earned for each manufacturer's tour.

**C. Preparing and Delivering Presentations**

Speakers may request CEUs for preparing and delivering presentations. Members receive three (3) CEUs per hour as a sole seminar presenter and two (2) CEUs per hour as a panelist in a seminar. CEUs may be requested only once for the same presentation.

CEUs are not awarded for preparing and delivering presentations for which the member receives payment. Reimbursement for travel related expenses or a small honorarium in lieu of travel, however, is not interpreted as payment, and therefore is allowed.

**D. Authoring Articles and Books**

Members may request CEUs for authoring articles and books. Articles must appear in professional, industry, or consumer publications; self-published or op-ed articles are not generally deemed appropriate for CPG approval. Items published in electronic venues are allowed.

Allocation of CEUs is based on the following definitions unless the author provides clarification to the contrary:

- Single author: sole author listed (0.50 CEUs per 500 words. The total words for separate items are accumulated for the year)
- Co-author: one of up to three authors listed (0.25 CEUs per 500 words. The total words for separate items are accumulated for the year)
- Contributing author: one of four or more authors listed (0.125 CEUs per 500 words. The total words for separate items are accumulated for the year)

**E. Authoring Reviews on Software and Books**

Members may request CEUs for authoring reviews on software and books. Reviews must appear in professional, industry, or consumer publications. Items published in electronic venues are allowed.

Two (2) units of CEUs are approved for authoring a review.

**F. Completing Educational Courses**

Members may request approval of educational courses finished within the year. Courses, including those taken by correspondence, must be successfully completed at a college/university approved by CPSTA or a recognized local educational provider, respectively. Courses are acceptable only when they can be demonstrated to update or enhance professional competency.

Members receive one (1) CEU per hour of instruction.

**G. Attending Trade Shows**

Members may request CEUs for attending trade and educational exhibits. As a service to members and program providers, FCSI - The Americas notifies members of pre-approved trade shows/exhibitions, with the awarding of CEUs automatic, subject to the required verification. When a member, however, attends a trade show/exhibition that is not pre-approved, the member must submit the trade show/exhibition for approval to receive CEUs.

Members receive three (3) CEUs for approved trade show/exhibition attendance.

**H. Viewing Educational Video or Multimedia Self-Study Programs**

Members may request CEUs for viewing pre-approved educational video / multimedia presentations.

Members receive one (1) CEU per hour of viewing.

**I. Providing Service to FCSI and/or Other Industry Groups**

Members may request CEUs for providing to FCSI and/or other industry groups service that requires substantial intellectual input. A minimum of ten (10) hours of service to the organization must be provided in each qualifying year. The time counted includes participating in meetings and accomplishing work outside of meetings but does not include travel time.

Members may receive three (3) CEUs for each qualifying year of service to FCSI.

**J. Activities Not Qualifying for CEUs**

The following are examples of activities that do not qualify as education for the purpose of earning CEUs:

1. performing job responsibilities
2. presenting products for sale
3. participating in an educational event (e.g., food/wine tasting) designed for consumers

4. attending seminars intended for consumers
5. attending association business meetings (general business, etc.)

## **IV. Administrative Issues Delegated to the CPS**

The WW BoD directs that the CPS develops and maintains administrative processes for the following functions (A-J):

The CPSTA intends that its activities and decisions are implemented at the level most informed about the functions. Consequently, the CPSTA may, while maintaining the overall responsibility, delegate the authority for implementing these functions. The CPSTA retains all authority that is not explicitly delegated. Table 2 later in this document defines those delegated authorities.

The CPSTA maintains descriptions of the administrative processes for these functions in FCSI - The Americas and transmits the appropriate description, upon request by a member, to the requesting member.

### **A. Procedures for Requesting Approval**

In most cases, the member requests approval of the CEUs after the date of accomplishing the activity by submitting a letter addressed to the local administrator or submitting a completed CEU Approval Form provided by the FCSI - The Americas headquarters office. The form must be submitted by January 31 after the year in which the ending date of the activity occurred and must include the information specified in Section IVB. (Verification of Activity) of this document.

Based on this information, the CPSTA will evaluate the request, provide a determination on the appropriate number of CEUs, and communicate the award to the member.

In some cases, the member or program provider may want to request approval of an activity prior to the date for accomplishing the activity by submitting a completed Request for Prior-Approved CEU Form provided by the FCSI - The Americas headquarters office. The form must be submitted at least four (4) weeks prior to the date of the activity.

Based on this information, the CPSTA will evaluate the request, provide a determination on the appropriate number of CEUs, and communicate the determination in a timely manner to the member or program provider.

### **B. Verification of Activity**

In order to grant CEUs to the member, the CPSTA must be able to validate that the activity was accomplished.

### **C. Record Keeping**

FCSI headquarters (HQ) maintains the official record of earned CEUs in a centralized database as approved by the CPSTA.

The start and end dates for each year are the same for every consultant member in the Society. For those becoming a member in the middle of a year, their requirement for earning CEUs starts on January 1 of the following year.

#### **D. Annual Reporting to Members**

On or before October 1 of each year, the CPSTA reminds FCSI - The Americas Board of Trustees (BoT) that it must by this date notify all members still requiring CEUs for the then current year.

On or before February 28 of the next year, the CPSTA reminds the BoT that it must by this date notify all members not meeting the continuing education requirement for the past year.

#### **E. Annual Reporting to the FCSI - The Americas Board of Trustees (BoT)**

At the end of the year, the BoT receives a report listing all members still requiring CEUs.

#### **F. Requests for Reconsideration and Appeals**

If a professional growth activity is not approved as qualifying as educational content applicable to the award of CEUs, a member may request reconsideration by the CPSTA only by submitting a written statement. The written statement must be postmarked within sixty (60) days of the date of notification of the original decision. The CPSTA shall respond to the member within sixty (60) calendar days following receipt of the written statement.

Should the member wish to appeal the CPSTA's decision on the request for reconsideration, the member may file an appeal to the Board of Trustees. The appeal must be postmarked within sixty (60) days of the date of notification of the decision by the CPSTA. If the appeal is received 30 days or more prior to a regularly scheduled BoT meeting, the appeal is heard at that meeting. Otherwise, the appeal is heard at the next regularly scheduled BoT meeting. The member may present his or her case in writing or in person. The BoT shall then respond within thirty (30) calendar days following its meeting. The decision of the BoT is final.

#### **G. Informing BoT of Changes Made by CPSTA - The Americas in this Procedures Manual**

The CPSTA will inform the BoT in writing about any changes made by the CPSTA regarding the requirements and the provisions of the CPG Program as stated in this document. The manner and form of this communication will be as specified by the BoT.

#### **H. Maintaining in the Public Record an Updated Procedures Manual**

The CPSTA will maintain an updated version of this document on the FCSI - The Americas website and, upon request by a consultant member, transmit a copy of the updated version of this document to the requesting member.

### **V. Administrative Issues Mandated by the WW BoD**

The WW BoD in its Policy Document mandates the following provisions (A-D):

#### **A. Failure to Meet the CPG Requirement**

“If a Professional member falls short of the required minimum units at the end of the year then, following discussions with the member’s local unit executive (LUE), the WW BoD delegates authority to the Divisional or Local Unit Board to reclassify the member to Senior Associate membership status within FCSI. During the period of being reclassified to Senior Associate membership status, the member remains within the membership directory as a Senior Associate.

If a Senior Associate member falls short of the required minimum units at the end of the year then, following discussions with the member’s local unit executive (LUE), the WW BoD delegates authority to the Divisional or Local Unit Board to reclassify the member to Associate membership status within FCSI. During the period of being reclassified to Associate membership status, the member remains within the membership directory as an Associate.

If an Associate member falls short of the required minimum units at the end of the year then, following discussions with the member’s local unit executive (LUE), the WW BoD delegates authority to the Divisional or Local Unit Board to terminate membership status within FCSI. Once terminated under this provision an individual may reapply for membership.

On or before June 30 after the end of the year, the local/divisional board notifies the member about its action of reclassification. Members may appeal to the FCSI worldwide Board of Directors should they believe they have grounds for consideration of extenuating circumstances.”

### **B. Recovering Membership Status**

#### “Within one (1) year of being reclassified to Senior Associate or Associate Status

To be re-instated as a Professional or Senior Associate member, the member must fulfill the original CEU obligation by making up the uncompleted number of units. If the unfulfilled requirement is fulfilled by the end of the one-year reclassification period, the member is immediately reinstated. Going forward, the Professional or Senior Associate member must fulfill the twelve (12) or six (6) CEU requirement for the standard yearly agreement, and the CEUs completed for re-instatement may not be used.

#### More than one (1) year past being reclassified to Senior Associate or Associate Status

After the one-year (1) reclassification period has passed, the member may request Professional or Senior Associate member status by applying through the then current application process.”

### **C. Conflicts of Interest for Members of CPS or WW BoD**

“A member of the CPS shall notify the CPS and WW BoD of any real or potential conflict of interest between his or her service as a CPS member and either (1) his or her fulfillment of CEUs as a member or (2) his or her involvement in a program, activity or course through which members may earn CEUs. A CPS member shall recuse himself or herself from any CPS decision that involves a real or potential conflict of interest.

Similarly, a member of the WW BoD shall notify the CPS and WW BoD of any real or potential conflict of interest between his or her service as a WW BoD member and either (1) his or her fulfillment of CEUs as a member or (2) his or her involvement in a program, activity or course through which members may earn CEUs. A WW BoD member shall recuse himself or herself from any WW BoD decision that involves a real or potential conflict of interest.”



**D. Keeping the WW BoD Informed**

“The CPS shall provide summary minutes of its meetings, including its actions and decisions, in order to keep the WW BoD informed. The WW BoD will then pass along this information to any subunits for which they are responsible.”

**Table 1: Summary of Qualifying Activities for Continuing Professional Growth and the CEUs Accumulated for Each in FCSI - The Americas (1).**

<b>Sect # (2)</b>	<b>CEUs</b>	<b>Activity</b>
A	20 per exam	Industry Knowledge Exam (IKE) and Professional Skills Exam (PSE) (points awarded when each exam is passed)
B	1 per hour	Attendee – educational seminar
B	1 per tour	Tours of manufacturer’s/supplier’s facilities
C	3 per hour	Seminar presenter (sole)
C	2 per hour	Seminar panelist
D	0.5 each	Published article or book (sole author) based on 500 word multiples
D	0.25 each	Published article or book (co-author) based on 500 word multiples
D	0.125 each	Published article or book (contributing author -- four or more authors) based on 500 word multiples
E	2 each	Published software or book review
F	1 per hour of instruction	Related educational courses approved by the CPSTA
G	3 each	Attendance at industry trade shows/exhibitions
H	1 per hour	Learning from pre-approved video or multimedia self-study program
I	3 for minimum of 10 hours per year	Providing service to FCSI and/or other industry groups

Notes:

1. Refer to Section V.C. of the CPG Procedures Manual FCSI-The Americas for the details.
2. Refers to Section III. of the CPG Procedures Manual FCSI-The Americas
3. In order to ensure that members stay current with information in the foodservice and hospitality industry, only a portion of excess CEUs may carry over from one year to the next. Referring to Section II of the CPG Policy Document: “Professional members may roll forward a maximum of six (6) CEUs, Senior Associate members may roll forward a maximum of three (3) CEUs and Associate members may roll forward a maximum of one (1) CEU to the following year.”

**Table 2: Delegated Authority for Specified Administrative Processes in the CPG Program  
In FCSI - The Americas and Described from the Point of View of the Member**

<b>Jurisdiction</b>	<b>A. Requesting Approval</b>	<b>B. Verification of Activity</b>	<b>C. Record Keeping</b>	<b>D. Annual Reporting to Members</b>	<b>F. Reconsideration</b>
The Americas (TA)	Send Mat'l to TA HQ, TA HQ staff decides	Send Mat'l to TA HQ, TA HQ keeps proof	TA HQ records	Receive letter from TA HQ	Send letter to TA HQ, CPSTA decides