



## MEMO

**Date:** June 1, 2017  
**To:** All CA PA|PG|PC Members  
**From:** Scarlet Hughes, Executive Director - CA PA|PG|PC  
**RE:** Changes to Certification Requirements

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I wanted to follow-up from our recent spring newsletter with further updates related to the upcoming launch of CA PA|PG|PC's new Association Management System (AMS), Member 365. With any system change there is often a need to rethink organizational processes to better align with current best practices and new system requirements. As we have gotten closer to migrating the Association membership records from our legacy system, Panoramic, to the more integrated and better aligned AMS specifically designed to meet the needs of Associations like ours, it has become evident that the Association's Executive Board needed to rethink the current certification requirements to make them both easier to understand, as well as track overtime.

The Board wanted to make sure that any new policy would have little impact to individual members while at the same time maintaining certification rigor. The Board also understands that business shifts occur that often affect program funding so wanted to make sure that counties continued to have flexibility in meeting certification requirements within as broad a timeframe as possible.

With that said, a new certification requirement has been created that meets these goals and is outlined below.

### **CURRENT POLICY**

#### Initial Certification

- Member in good standing of the Association (payment of membership dues and county fees current)
- Compliance with and upholding of the Code of Ethics of the Association
- Forty (40) credit hours of training within a four-year period immediately preceding certification, which have been approved by the Association. The training must be given by a provider, which has been approved by the Association. A "Certificate of Completion" will be issued when a member has obtained 40 credit hours of training anytime within the four year period. Provisional Status may be awarded to a member who is satisfactorily working towards certification, but who has not yet completed 40 credit hours in the allotted time. To qualify for Provisional Status, a member must complete 20 credit hours of training within a two-year period commencing with employment in a Public Administrator's, Public Guardian's or Public Conservator's office. The member must complete the remaining 20 credit hours of training within the next two consecutive years to meet the four-year requirement.

### Maintaining Certification

- Member in good standing of the Association (payment of membership dues and county fees current)
- Compliance with and upholding of the Code of Ethics of the Association
- Twenty (20) credit hours of continuing education within a two year period commencing with certification or recertification, which have been approved by the Association. The training must be given by a provider, which has been approved by the Association.

### **NEW POLICY AS OF JULY 1, 2017**

- Member in good standing of the Association (payment of membership dues and county fees current)
- Compliance with and upholding of the Code of Ethics of the Association
- 40 credit hours of continuing education every 4 years. The training must be given by a provider, which has been approved by the Association.
  - Penalty: If a member does not meet the 40 hour requirement in 4 years, they are noted in the system as non-certified and to be in compliance must by the end of the second four-year period meet 40 hours in the 4 years as well as any additional hours not completed in the prior 4-year certification window.

Example: If a member completes 35 certification hours in a 4-year window, the subsequent 4-year certification window would be the standard 40 hours required as well as the additional 5 hours not completed in the prior certification window. This penalty is cumulative each 4-year cycle.

### **WHAT THIS LOOKS LIKE MOVING FORWARD**

The following will apply once the new certification standards take effect July 1, 2017.

If a member is currently in a 2 (two) year certification cycle:

- With one year remaining to acquire the currently mandated 20 credits in two years, their recertification year would change adding 2 additional years to acquire the 40 credits in 4 years. An example would be someone who was due to be fully certified in 2-years with 20 credits by the end of FY 17-18 would now have to be fully certified under the new 4-year window with 40 credits by the end FY 19-20
- And is due to complete their two year cycle at the end of this FY, their next certification window would be in 4 years.

If a member is currently in a 4 (four) year certification cycle:

- They continue on their current course with no change to when certification applies for them since they currently align with the new criteria

Certification will continue to be based on a fiscal calendar year from July 1 - June 30. For example, if a member completes 40 hours of certification training by November 1, 2016, their certification date will be June 30, 2017.

We are sensitive that this is a new policy taking effect July 1 and as such, will not place any

certification penalties during the first year of implementation to ensure counties have enough time to meet these new requirements.

All other policies as currently outlined in the Standards and Certification Process will remain the same including a dispute resolution process where there may be discrepancies in certification records between a member and the Association.

We appreciate your patience as we begin to make the necessary certification record changes to meet this policy shift. We anticipate most, if not all, certification records should be accurate and aligned to the new requirement by October 1, 2017.

Should you have any questions in the interim, please feel free to contact us at [info@capapgpc.org](mailto:info@capapgpc.org). Thank you.