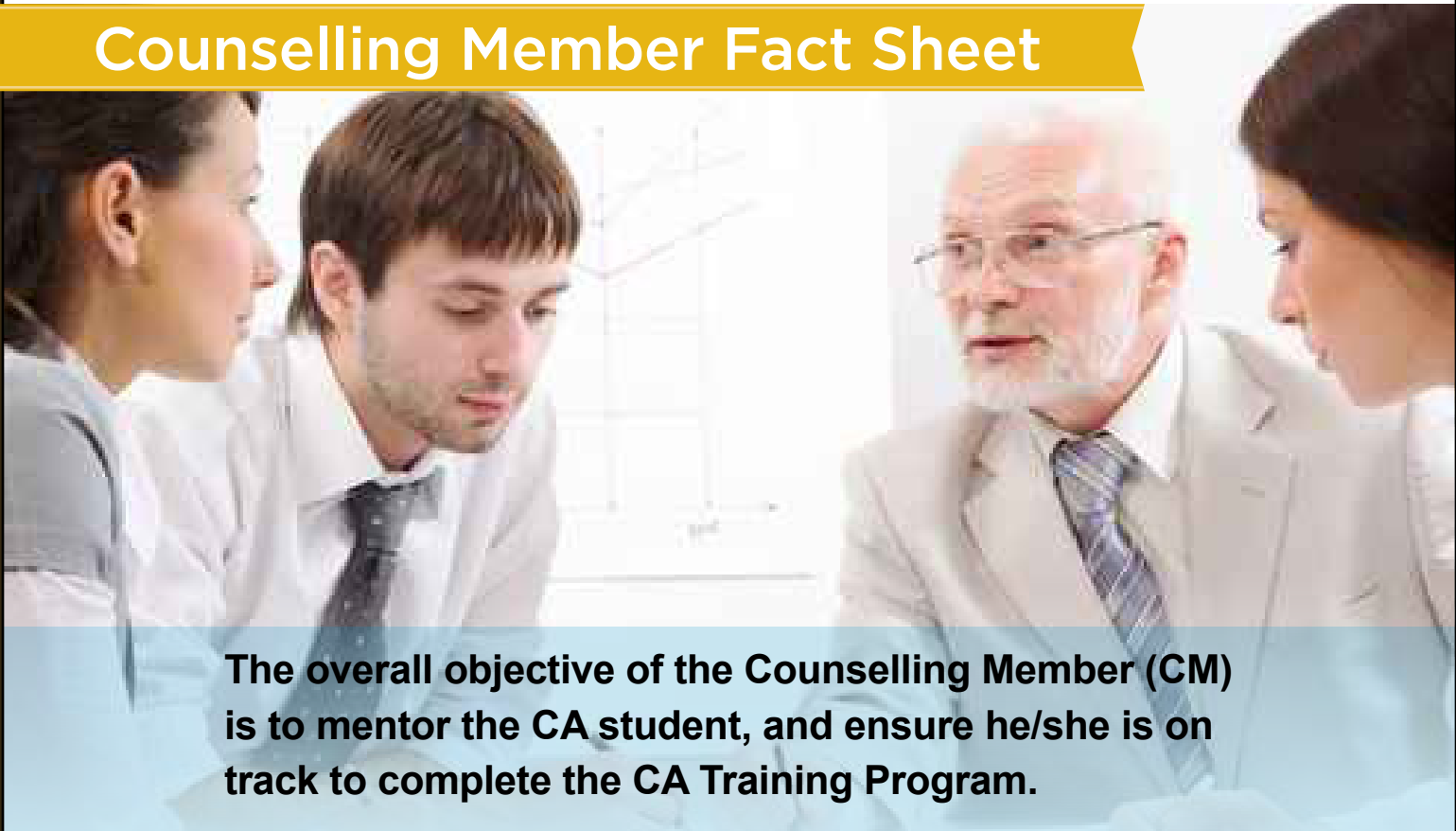


Counselling Member Fact Sheet



The overall objective of the Counselling Member (CM) is to mentor the CA student, and ensure he/she is on track to complete the CA Training Program.

7 Role of the CM

- A CM must be a CA in good standing with a Provincial Institute/Ordre (unless otherwise approved by the profession). The role of the CM is to mentor the CA student, and ensure that he/she is on track to complete the CA Training Program. In order to do this, the CM must:
 - **Understand the competency map** that applies to your organization (CA firms in external audit can refer to the [Sample Mapping Tool](#));
 - **Liaise with Line Managers** (or read performance reviews) to obtain an overall understanding of the CA student's development to ensure he/she is on track to complete the CA Training Program;
 - **Conduct semi-annual meetings** with the CA student to discuss his/her progress within the CA Training Program, using the student's Record of Qualifying Experience (RQE) and any other tracking documents as the basis for the discussion (the CA Training Office must maintain evidence of the semi-annual meeting between the student and the CM, which could include keeping copies of the signed RQEs);
 - **Provide guidance** on how the CA Training Office supports the CA student with his/her professional examinations;
 - **Talk to the Training Principal (TP)** if there are material changes required to the approved CA Training Program, including duties within an existing rotation;
 - **Involve the TP if the student is not on track** to become a CA, for whatever reason. This could arise if: the student is not gaining exposure to the required experience; if there are structural or political issues; and/or if the CA student is not performing to expectations (either the specific competencies or the pervasive qualities and skills).

7 Myth Busters

- Mentoring CA students does not have to be incremental to what would otherwise be provided to all employees during their semi-annual performance reviews, except a discussion around competency development is required.
- It's important to note that as a CM, you are not assessing competencies. Rather, you are assessing the student's progress and ability to complete your company's CA Training Program based on the available information (such as the RQE, performance reviews, tracking documents, approved competency map or [Sample Mapping Tool](#), etc.). If the student is not on track, you should communicate this to your TP.
- If the student and his/her CM do not agree, then the student does not have to change the RQE.
 - Students are encouraged to consider and amend based on feedback from their CM; if CMs ultimately disagree with the RQE, the CM should note the difference on the RQE under section VI.

7 Best Practices for the CM

- When the CA student starts employment at the CA Training Office, the CM should meet with him/her to discuss the specific training program that has been approved by the profession. The CM can introduce the concept of the RQE and explain the competencies that will be developed throughout the term of practical experience.
- The CM may share a copy of the approved competency map with the student. In doing so, the student can better understand the duties expected from him/her in order to complete the CA Training Program. For CA Firms in external audit that do not have a customized map, please refer to the [Sample Mapping Tool](#).
- The CM should let the TP know if they identify more opportunities for developing depth and breadth beyond what was previously approved, or want to add, modify or delete areas.
- A CM should also mentor the student beyond the minimum requirements of the CA practical experience requirements including how to perform well and progress at the company in the long term.

7 Resources

- [FAQs](#)
- [Downloadable Instructions to complete RQE](#)
- [eModule](#)
- [Recorded Webinar held live on July 31, 2012](#)