What CPA Mentors need to know

As a part of the CPA Practical Experience Requirements (CPA PER), future CPAs need to demonstrate required technical and enabling competencies through a term of relevant practical experience of at least 30 months. As a CPA Mentor, you will provide guidance to future CPAs on their competency development, with a focus on supporting the development of the five enabling competency areas–professional and ethical behavior; problem-solving and decision-making; communication; self-management; and teamwork and leadership. CPA Mentors play a critical role in modeling and upholding the professional and ethical standards expected of CPAs.

Time Commitment

Your mentee is required to meet with you at least semi-annually to discuss their progress toward satisfying the CPA PER, with an emphasis on the development of the enabling competencies. Semi-annual meetings are a minimum requirement and most future CPAs will meet with their CPA Mentors more frequently, especially in the first six months of their relationship as they establish rapport and trust.

While there is no defined time commitment for mentoring relationships, you can expect to spend an average of 15 hours per year per future CPA on mentoring activities. The frequency and duration of meetings are determined by you and your mentee based on your mutual needs, provided you satisfy the minimum requirement of semi-annual meetings.

Meetings

Meetings between you and your mentee must be synchronous, meaning that communication needs to occur at the same time. In-person meetings are ideal, but are not always practicable. Mentoring conversations that take place over the phone, Skype, Facetime, or similar technologies would also qualify as meetings. Exchanges through email or text can supplement mentoring relationships, but would not be considered meetings.

CPA Mentorship

Expectations

CPA Mentors, future CPAs, and the profession have different roles to play:

CPA Mentors	Future CPA Mentees	Profession
Support future CPAs in developing or reviewing a learning plan	Create (Experience Verification route) or review (Pre-Approved Program route) a learning plan that outlines how required competencies will be achieved	Provides resources to support CPA Mentors
Document meetings in the online Practical Experience Reporting Tool (PERT)	Record experience to-date and a self-assess level of proficiency in PERT	Assesses practical experience against the CPA PER
Meet with future CPAs at least twice a year to discuss enabling competency development	Request meetings with CPA Mentors at least twice a year	Ensures meetings are taking place at least twice a year
Document any unresolved concerns related to future CPAs' competency development in PERT	Identify areas requiring further development to meet the CPA PER	Solicits feedback on mentorship program
Assist future CPAs in creating a specific goal to focus on achieving until next meeting	Guide meetings with CPA Mentors	Continuously improves mentorship program
Discuss future CPAs' development with supervisor as required	Request that supervisor verifies accuracy of experience claimed (Experience Verification route only)	Admits future CPAs to membership once certification requirements are met
Stay up to date on CPA PER	Seek feedback from CPA Mentors	
	Act on feedback from CPA Mentors	

As a CPA Mentor, you are not expected to:

- Verify the accuracy of future CPAs' competency development
- Assist future CPAs to progress through their professional education program
- Help future CPAs find employment
- Have detailed knowledge of the CPA certification program
- Be a CPA competency map expert
- Take responsibility for ensuring future CPAs develop required competencies

Lifecycle

You will take different actions throughout the life of your mentoring relationship:

Focus	Meeting	Timing	Actions
Get prepared	N/A	Pre-relationship	1. Understand the requirements 2. Understand the competencies 3. Know what is expected 4. Become familiar with PERT 5. Pair up with a future CPA
Establish the relationship	1	First 6 months	1. Get to know each other 2. Understand where you're headed 3. Set the parameters
Build the relationship	2-3	First 6 months	1. Carry on 2. Begin to have mentoring conversations 3. Work with diversity
Make progress	4+	Ongoing	1. Review progress 2. Provide guidance 3. Decide upon next steps 4. Document meeting
Close the relationship	Final	End (≈30 months or ≈24 months in Quebec)	1. Review learning 2. Give thanks 3. Decide upon next steps

Support

Given the importance of your role, numerous resources are available to assist you in supporting your mentoring relationships:

- A mandatory **CPA Mentor Orientation** to further clarify expectations

- An **interactive user guide** to provide performance support as you use PERT

- An online **Centre for Mentoring Resources** containing support materials, including CPD-eligible webinars

> If you require additional assistance, feel free to contact your **provincial/regional body.**