

CPD Forum

- PARN Special Interest Group

Notes of meeting on 20th November 2019, at the Institute of Physics

1. Welcome and Apologies

Nick Bartlett, Senior Director, CPD Competences, CFA Institute, welcomed the 36 members and thanked the Institute of Physics for hosting this meeting in their new technically very advanced building. He noted that members appreciated the opportunity to meet at different venues, with the key aims of sharing and learning from a variety of experiences and perspectives on CPD, across a range of professions.

He thanked Chris for organising the meeting, and reported that he would be ending his long involvement with the CPD Forum at the next meeting in March.

2. Institute of Physics

Vishanti Fox, CPD and Careers Manager, presented the Institute of Physics as the professional body and learned society for Physics in the UK and Ireland, and outlined the support given to its 23,000 members. The IOP works with a range of partners to support and develop the teaching of Physics in schools. Members come from across the Physics community whether in industry, the classroom, and in technician and other roles; and all who have an interest in Physics and the contribution it makes to culture, society, and the economy. It is a world leader in publishing and is proud to be a valued voice for Physics.

Support for the very wide range of members includes many online courses, workshops and conferences. A major Career Development hub provides a platform for work activities; and works to change the CPD process to be more reflective-based, creating a CPD framework that applies both to professionally registered and other members. This aims to help change members mindsets to growth in their approach to CPD. A mentoring service is being established; but at present there are insufficient mentors to cover all registers members.

Amy Pearce, Registration Manager, described the audit being conducted involving all chartered Physicists, showing how it impacts on the CPD framework. A major aim is to change the culture from having to do 30 hours/year, to seeing it in terms of outputs achieved. Contacting all members provided a range of questions with the key responses of What is CPD?, who is assessing my CPD?, I do not work in Physics so am I allowed to keep my chartered registration? CPD requirements differed as members had different professional responsibilities. This can demonstrate a level of knowledge that can be relied on by employers in the wider community. CPD is essential to stay up to date and be recognised as a professional, through engaging in CPD activities and reflecting on and recording the results of CPD.

The audit has been very useful and lessons learned, The next steps include providing examples of CPD practice, and a focus on workplace learning and broadening members perspectives on CPD.

3. A Fresh Learning Experience: Progress and Challenges in implementing a CPD Program for an International membership

The CFA Institute is the worlds largest Association of Investment professionals with a global network of over 150 member societies and 160,000 charterholders. It aims to advance ethics, market integrity, and professional standards of practice. A core qualification, the CFA Program, is taken by over 300,000 practitioners annually. The Institute has turned its strategic focus to CPD, the development and delivery of a compelling CPD product and a major review of the CPD standards required.

The presentation was given by:

Nick Bartlett, Senior Director, CPD Competences

Richard Fernand, Senior Director , CPD online Learning

Anastasia Diakaki, Director, CPD Content Director, EMEA

The speakers described creating a fresh learning experience through

- developing a competency framework
- building a content strategy
- designing and delivering a learning platform
- ensuring governance and oversight

Societies are playing a leading role in examining the key competences and creating the related career pathways required the engagement of over 200 participants in 20 societies. Analysts developed a taxonomy of skills within 20 job roles. This covered ethical behaviours and the six areas of soft skills; collaboration, communication, curiosity, emotional intelligence, leadership, and personal effectiveness.

The current CPD Program is recommended and mandatory and requires a minimum of 20 hours, with 2 hours on standards, ethics, and regulations each year. It can be through self study, employer based, and CFA Institute or Society learning activities. In 2018. 66% of members were attested. Attestation should be annually. New and reactivating members do not attest. Results vary across different countries with India notably low. This may result from different attitudes to lifelong learning and membership. Professional learning is a preferred term from CPD in many countries.

With regard to Mandatory CPD members are equally for and against (45% each). Support is lowest in North America. Low turnout is driven by apathy in veteran members and low awareness among newer members. Supporters cite professionalism as their motivation; opponents are concerned about control of their development. In due course there may be another vote on the mandatory issue; it is noted that in China there was a low turnout to voting.

In further developing CPD a number of challenges are noted. Philosophical on the complex decision making at CFA Institute, Technological with constraints of developer/IT capacity, and Content with constraints relating to the diversity of membership and different context needs. However the work to date has shown support from senior leadership, and valuable networking of experts.

In continuing the work in progress a key message is that learning experience should be 'delightful', and directly related to work experience.

4. Support and Supervision at different career stages

Dr Stephanie Tempest, Professional Development Manager at the Royal College of Occupational Therapists, noted a number of initiatives under way; these provide supervision and support aimed at a number of career levels from students, newly qualified professionals, those returning to work, through to advanced clinical practitioners.

Professionals need to develop skills to fill new innovative roles. Support was gained by groups of people working and learning together with material from podcasts. Later professionals faced challenges as they moved into positions with director level roles, joining networks and links with others. Mentoring is increasingly used, especially reverse mentoring in technical subjects. Guidance booklets are valuable for many special interest groups.

Stephanie is interested to hear from other members about models of guidance and ways to support professional development. She is especially looking for advice on:

- How does your profession support the transition into newly qualified practice?
- How does your profession support the development of advanced practitioners?
- Do you have any preceptor ship/supervision processes that you would be happy to share?

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5. Key Issues in CPD

Robert Pitts, Head of Services at PARN, gave an overview of the main results from the CPD survey carried out with members of the Forum earlier in the year. This was open for 10 days and had a 30% response rate. The key points noted are:

- 58% had been members for over 5 years
- 63% had found out about the Forum from a colleague
- 68% work for a professional body; 16% for a regulatory body
- People are members of the Forum as it allows colleagues to share best practice, and it is useful to hear from other organisations how they handle CPD
- 74% are currently working on CPD initiatives; notably in providing more online resources for CPD; and implementing new outcomes based CPD
- 63% would like the Forum to provide one or two sessions a year to support their own personal development
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The meeting then worked in 3 discussion groups; with members focusing on:

- Current Issues; Non-compliance with CPD requirements; Emphasising the importance of CPD to members; and Finding a unified model that fits all bodies.
- Future Issues of How different bodies handle CPD, Practical case studies on the impact of CPD, and Effective online CPD

6. Information and views from members

In the discussion groups in item 5 the following points were highlighted:

- need to recognise the wide range of members; depending on areas of work employers, responsibilities, attitudes to learning, etc.
- career development/success requires continuous learning

- emphasise the benefits of lifelong learning; whereas CPD is considered the regulatory bit and not seen positively
- Need to ensure CPD is marketed properly, and reinforced. Should deliver message in 7 different ways get out across
- any model based only on inputs/hours is not helpful
- careers are less hierarchical/up down; and more sideways across; need to adapt continuously
- allow for greater use of mobile phones at all times; allows for flexible approach to learning
- many sources of online learning; encourage members to learn from whatever situations that works for them
- Important to capture both formal/planned/organised activities; also ad hoc/informal/unplanned experience
- regulators check on CPD in areas they are worried about

7. Date and venue of next meeting.

The next meeting of the Forum will be on 11th March 2020, hosted by the Royal College of Veterinary Science. Chris would welcome proposals for items for this; also for hosting further meetings later in the year.