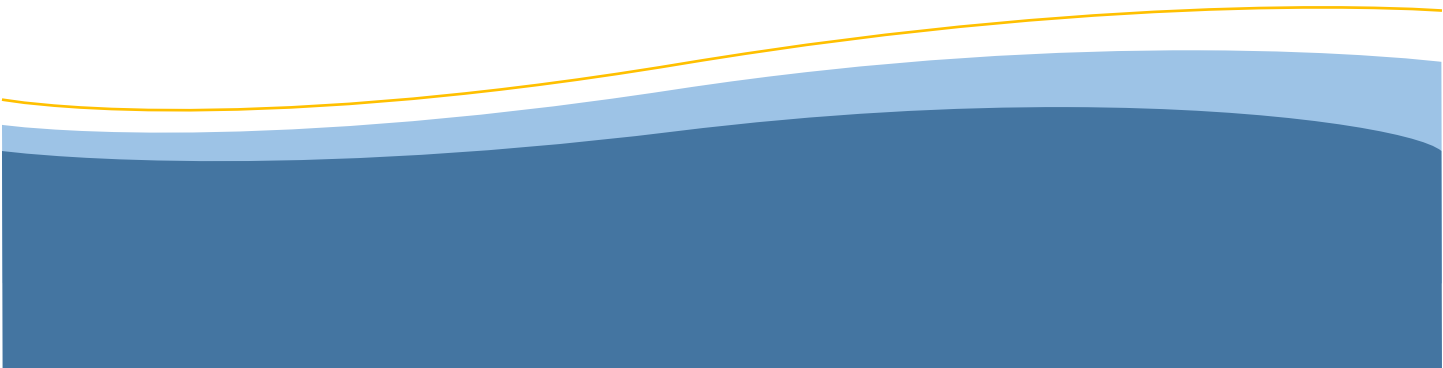


Institute of Management Services

Guidance Booklet



**CPD is the holistic commitment of professionals towards the enhancement of personal skills
and proficiency throughout their careers**

CPD - Overview

“Building your knowledge throughout your career”

What is CPD?

The Institute of Management Services CPD Programme is a mixture of activities that will promote excellence and professionalism. It takes a look at different ideas, approaches, techniques and activities that will help you successfully manage your own learning and growth. The beauty of CPD is that it focuses firmly on your results and clearly shows the benefits that professional development can bring to your own professional standing.

The clear message is that CPD is unique to each and every one of us. This means that wherever you are in your career now, and whatever you want to achieve in the future, your CPD should be exactly this; unique and personal to you.

CPD is essential to your effectiveness and development, it is most definitely on your list of ‘must-haves’ for your future career success. Your professional development also makes a significant contribution to your team’s and your company’s performance.

To help you to benefit from the IMS CPD Programme in the most efficient way, the IMS provides a focused, logical structure that helps you to keep learning as your career progresses. It enables you to identify any gaps in your knowledge and skills. It encourages you to identify a range of activities to help you confidently bridge the gap from where you are currently and where you want to be in the future. By recording your progress with these activities, you will demonstrate direct and concrete proof of your commitment to continuous development. In turn, this will show current and potential employers that you are serious about maintaining your knowledge and skills and striving for excellence.

So wherever you are now and wherever you want your career path to go, continuing professional development helps you take the next step forward to further professionalism and excellence.

The IMS encourages members to log their CPD activity throughout the year to provide a structure for continuous development. Members who obtain 25 credits (equivalent to 25 hours of study) in the year can apply on payment of a £25 fee for certification of the CPD they have undertaken. Upon verification of the CPD undertaken the Institute will issue a CPD certificate, confirming that the holder has met with the IMS’s CPD requirements. It is essential that individuals renew their CPD certification annually with the Institute.

Your CPD should be logged on the pro forma document Learning and Development record contained in Annex A of these guidance notes or obtainable from the Institutes website: www.ims-productivity.com.

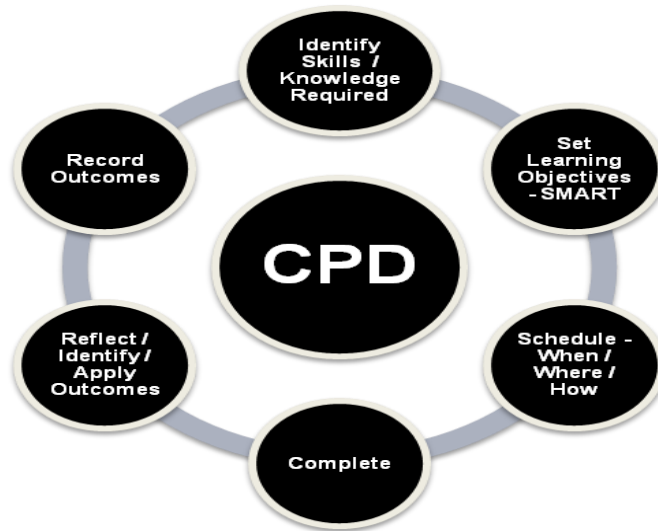
Approaching CPD - A Suggested Model

A key aspect of the Institutes CPD programme is its flexibility as it permits the member to undertake CPD that is most appropriate and useful to their own personal development without constraints on the form or nature of the CPD undertaken.

This section provides information and guidance on how to undertake CPD in order to achieve and maintain fitness and competence.

1. CPD Learning and Development Model

The CPD model shown below is considered by the Institute to be an effective method for planning and undertaking CPD. This includes the use of SMART objectives (Specific, Measurable, Achievable, Realistic and Timely). It is advisable to use all aspects of the model as this will lead to meeting the planned outcomes.



2. Identify Skills / Knowledge Required

This should ideally take place on a regular basis. This review should look at the specific knowledge that you need to review or to learn. It should serve to identify the additional skills or knowledge you may need in order to take on new business or meet changing demands in your employment.

a. Areas of learning and development to consider can include:

- i. personal values and standards such as ethics and professional conduct
- ii. legal knowledge and skills in business;
- iii. business management and productivity techniques;
- iv. working with others;
- v. customer service and quality;

b. Relevant Learning and Development

Learning and development must be relevant to the business and work undertaken by you and your organisation. You must be able to demonstrate relevance when submitted your CPD to the Institute.

c. What Method of Learning and Development to Choose

It is up to you, with support from your organisation, to choose how the required learning and development should be undertaken. Consideration should be given to your preferred learning method and how the desired outcomes will be met. Learning can include formal, informal and blended learning. Choose a combination that suits your learning style.

Formal Learning is when there is a set timetable, programme, aims and objectives. A qualified teacher, a confirmed date and time and specified classroom. There is also usually an end of class assessment with feedback.

Informal Learning is when there is no set timetable, programme, aims or objectives. There is no teacher, no classroom and no feedback, and in certain cases no set date or time. This can include self-study, meetings or networking.

Blended Learning is a mixture of both formal and informal learning.

Learning methods could include the following but it is not an exhaustive list:-

- i. classroom training;
- ii. on-line training;
- iii. in-house training;
- iv. conference or meeting;
- v. webinar;
- vi. review of the productivity related websites;
- vii. reading material and blogs from reputable sources;
- viii. supervision, coaching and teaching.
- ix. Performance Rating Clinics

d. Obtaining Quality Learning and Development

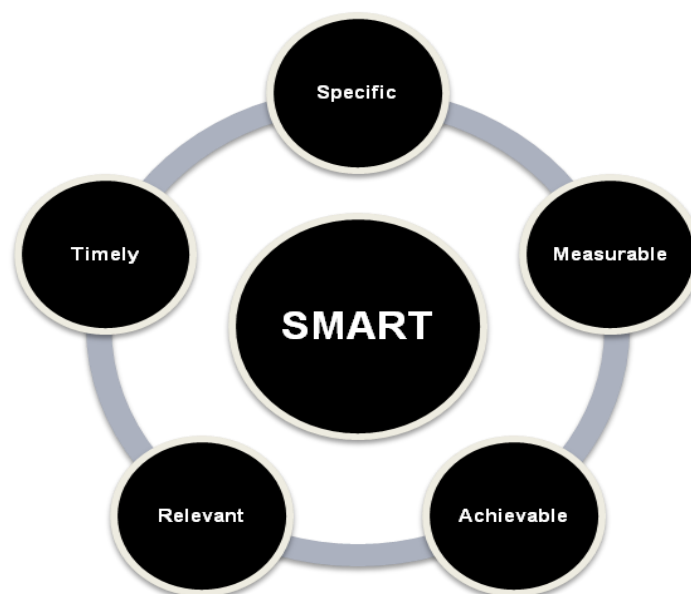
It is strongly recommended that all learning and development should be obtained through reputable providers to ensure quality of standards and value for money. For example, formal training accredited by the Institute or other recognised professional bodies.

For informal training, you should conduct independent research to verify quality and credible content and be wary of websites such as Wikipedia and some personal blogs, as the content's accuracy cannot be guaranteed.

3. Set learning and development objectives (SMART)

SMART objectives are explained in detail below. When setting your objectives you should consider your organisation's business plan and how your skills and knowledge are linked to it. Identify the learning and development required to achieve these objectives.

4. What are SMART Objectives?



a. Specific

What exactly do you want to achieve? The more specific your description, the greater the chance of achieving the objective.



Questions to consider:-

- 1) What exactly do you want to achieve?
- 2) Where?
- 3) How?
- 4) When?
- 5) With whom?
- 6) What are the conditions and limitation?
- 7) Why exactly do you want to reach this objective and are their alternative ways of achieving the same objective?

b. Measurable

Measurable means to identify exactly what it is you need to learn and that there will be evidence of this learning to confirm that the objective has been reached.

c. Achievable

Is the objective achievable? Is there a reputable provider for the learning and development that has been identified? Is it achievable when consideration is given to the costs and time involved?

d. Relevant

Is the learning and development identified relevant to you and the organisation? If you are lacking certain skills or knowledge, plan training to rectify this. Consider what achieving this objective will mean.

e. Timely

Learning and development should take place at an appropriate time. Install deadlines for the training that are realistic and flexible. Short or inappropriate deadlines can result in stress and anxiety and may even lead to cancellation of the learning.

5. Schedule when / where / how

It is essential to schedule training to avoid known busy periods within your organisation. Complete a Learning and Development Plan and schedule the training. Plan in advance when to put into practice any learning completed.

6. Produce a Learning and Development Plan

A Learning and Development Plan is a useful way to identify and prioritise the skills and knowledge needed in order to offer an improved service to clients and to the organisation. A template Learning and Development Plan is available to download from the Institutes website if required and attached to this document as Appendix B. Evidencing a well-considered and completed learning and development plan is a good way of demonstrating that you have thought through how you are going to maintain your competence.

7. Complete Learning and Development

Complete learning and development according to the Plan and then put into practice as soon as possible any learning gained so that the knowledge is not lost.

8. Produce a Learning and Development Record

Once the learning and development identified in the Plan has been undertaken, the Learning and Development Record should be completed. This includes details of what, how and when the learning and development was completed together with supporting evidence. This should be maintained for monitoring and review purposes by the Institute. A template Learning and Development Record is available to download from the Institutes website if required and also attached to this document Appendix A. This is another document that, when properly completed, will demonstrate to the Institute that CPD has been considered and the member is maintaining their competence.

9. Reflect / Apply / Identify Outcomes of Learning and Development Undertaken

a. How to Evaluate Learning and Development Undertaken

Were the SMART objectives met and have the desired outcomes been achieved? If not, what was the reason and what is the remedy to meet the objectives. Consider conducting file reviews to measure any improvements in performance.

b. How to Apply Learning and Development Obtained to the Business and Casework

Utilise the learning and development that has been completed. For example by improving business processes or by taking on new responsibilities. You may feel confident following new learning and development to apply to the Institute to upgrade your level of members. If it is not utilised soon after completion, learning and development will be forgotten and therefore wasted.

10. Record Outcomes

Decide whether the planned outcomes were achieved by reflecting on what was learnt in each case and whether any follow-up is required. These outcomes should be noted in the Learning and Development Record.

APPLY TO INSTITUTE FOR CERTIFICATION

Finally having completed your annual CPD requirement of 25 hours you should apply to the Institute for certification that you have undertaken this training. You should send your completed Learning and Development Record together with supporting evidence and the certification fee of £25 to Institute of Management Services Lichfield Business Village Staffordshire University Centre, Friary Way, Lichfield, WS13 6QG

APPENDIX A

Institute of Management Services
Continuing Professional Development
Learning and Development Record



Name:		Job Title	
Employer:		CPD Year	
Address:			

No:	Date	Details of CPD Activity
1		
2		
3		
4		
5		
6		
7		

Applicants should provide full details by way of an additional written submission that fully explains in no more than 250 words the individual CPD activity by clearly explain the following:

- Why did you undertake this activity/learning?
- How will you apply this learning?
- Duration and format of learning

Institute of Management Services

APPENDIX B

Continuing Professional Development - Learning and Development Plan

NAME				
HOME ADDRESS				
EMPLOYER				
JOB TITLE				
CPD PERIOD From- To				
What do I need to Learn	How will I achieve This	What support do I need	What are the Learning Objectives	Time Scale
<i>Be specific about what you need to learn</i>	<i>What Learning Methods will you use and prefer</i>	<i>Think about the cost and your time. Who will assist you in choosing and booking the learning</i>	<i>What do you hope to learn and how will you put this into practice at work</i>	<i>The Dates you plan to undertake the learning</i>

Accompanying Notes

The CPD Learning and Development Plan can be used to help you plan, analyse and reflect upon your CPD requirements for the coming year. It is central to the scheme and should detail how you will fulfil your requirements.