How to prepare a CPD Plan

A CPD (continuing professional development) plan is the first step to achieving your CPD goals

What is a CPD Plan?

A CPD Plan is a step-by-step framework for you to:

- list the main areas of work you do now
- articulate your longer-term aspirations for the future
- identify goals you want to achieve in the next few years
- define what you need to achieve your goals
- determine which specific activities will meet your needs.

Each CPD Plan will be different because no two individuals will do exactly the same job or have the same aspirations, abilities, opportunities, learning styles or needs.

Writing and working through your CPD Plan

STEP 1: CURRENT ROLES AND FUTURE ASPIRATIONS

Where am I now, where would I like my career to take me?

Current roles

List what you do now under a few broad headings. You could begin by looking at a job description provided by your employer and consider whether it corresponds to actual responsibilities, duties and activities. You need to know and understand what you do before you can plan how to develop.

Future aspirations

Consider your immediate career prospects and think beyond them to the limits of your appetite and ability to make your mark as a professional. What are your long-term goals? Most CPD Plans list two, three or four.

No one is going to come back to you in five years’ time and chastise you for not fulfilling these aspirations! You will not be held to them, but unless you think about what you truly want to do in the future you cannot plan for it.
STEP 2: GOALS

Where next?

Goals
What you want to achieve will change with circumstances as you learn more about yourself, where you work and the sector generally. It is important to identify goals for the next few years that form a platform for your longer-term aspirations and are compatible with your immediate personal circumstances, opportunities and the organisational objectives of your employer.

What are your values and the interests and skills you want to develop? To achieve the promotion or change in career direction that you aspire to, what improvements in work performance will you have to make? What further knowledge and qualifications will you need? In what areas will you need to develop greater self-confidence or upgrade your skills?

The planning horizon for your CPD Plan will depend on your personal circumstances. Most CPD Plans identify goals to be achieved over the next 18-24 months.

STEP 3: NEEDS

What do I need to get there?
You have identified your goals. What do you need to achieve them? Look systematically at each of the goals in turn. To make them manageable and achievable you will need to think through your goals, consider the overlaps between them and break them down into a set of specific learning and development needs whose fulfilment you can measure. Be realistic about the resources and time available to you. There are a variety of approaches to needs analysis, some of which are outlined below. Use whichever elements of whichever techniques you feel most comfortable with.

One way in which it may be useful to define learning and development needs is in relation to each of the four categories under which you will eventually be asked to summarise your CPD.

1. personal competence
2. management knowledge and skills
3. specialist knowledge and skills
4. professional contribution.

For further guidance on what each of these headings means please download the PDF on how to prepare a CPD Summary.
Other techniques you may find useful when considering goals and needs include:

Formulating and answering a set of questions:

- What do I do well?
- What could I do better?
- What current knowledge and skills do I need to keep up to date?
- What new knowledge and skills might I need?
- What might my organisation need from me?
- How might new technology and other changes affect my work?
- What problems or constraints (organisational / personal) lie ahead for me?

Add and answer some more of your own questions.

**Reflect on feedback**
Use what you have discussed with your line manager, colleagues or users. Look back at notes from your Appraisal or Performance Management interview.

**Complete a SWOT**
This is an analysis of your Strengths, Weaknesses, Opportunities and Threats. Again, when completing this you may find it useful to involve others: line manager, colleagues and ‘critical friends’.

**Complete a PESTLE**
This is an analysis of the Political, Economic, Social, Technological, Legal and Environmental issues that may be facing your organisation and/or the profession as a whole that can be used to inform your future planning.

When identifying what you want to do, achieve or improve, it is important to be as specific as possible and consider how you will measure your achievements.
STEP 4: ACTIVITIES

How can I meet my needs?
Once you have identified your goals and defined your needs you will have to determine which specific activities will meet those needs. Consider a full range of activities you could undertake and make a realistic assessment of time and resources available to you to undertake them. Select a spread of different activities that will give you a balance of different types of learning and development and that will translate into specific outcomes.

Before completing this part of your CPD Plan, you may find it useful to try some of the following approaches. Look back on past achievements and development activities and consider:

- what went well?
- what went badly?
- what was the most effective way you learnt?
- who helped you?

Think about your learning style

Activists - learn best from new experiences and immediate and active involvement in practical tasks.

Reflectors - learn best from situations and activities in which they can stand back, listen and observe before they act.

Pragmatists - have some similarity with activists but learn best when they can see a clear, practical link between subject matter and a personal or work-based problem or opportunity and either use the method(s) to undertake their development or even plan to use a different method of learning in order to become a more balanced learner.

Theorists - have some similarity with reflectors but prefer their learning to be set in the context of a model, concept or theory.

Categorise different types of learning activities
Some of the options you could consider are:

Work based

- special projects
- secondments (inside and outside the organisation)
- shadowing others
- mentoring (for self and of others)
- coaching (for self and of others)
- committee work
- contributing to planning
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<th>Professional</th>
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<tr>
<td>• being an AMA mentor</td>
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<td>• joining a CPD group</td>
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<tr>
<td>• involvement with a regional agency or federation, a specialist group,</td>
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<td>Museums Association or ICOM committee.</td>
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<th>Formal learning</th>
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<td>• professional or vocational education courses</td>
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<td>• degree, higher degree, research and post qualification studies</td>
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<td>• attending short courses, conferences, seminars and workshops</td>
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<td>• writing or reviewing conference papers</td>
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<th>Informal learning</th>
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<td>• reading and reviewing journals, books, newspapers</td>
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<td>• using other learning materials, eg videos, CD-Roms, audio tapes</td>
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<td>• using the internet</td>
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<td>• voluntary activities, e.g. school governor, PTA member, youth leader,</td>
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<td>local councillor</td>
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STEP 5: KEY DATES

When will I make it happen?
Committing your plan to paper will make you more committed to making it happen. But you cannot make it happen all at once. You need to prioritise. You need to consider which things need to be done before you can start on others, or which items are more important or time-bound (i.e. the opportunities will only arise at a certain time).

You can then put your list of activities in order of importance and establish some time frames. Your plan will not survive critical scrutiny unless there is evidence in it of time planning, such as dates, durations, schedules and deadlines. Make your time frames sufficiently challenging but also realistic.

STEP 6: CROSS-REFERENCING

How does my CPD fit with other agendas?
The blank CPD Plans available from the Museums Association are only a guide. The format you prefer may be landscape rather than portrait, A4 rather than A3. You may prefer to draft, edit, save and print from a computer rather than to handwrite. Most importantly, you may even wish to add extra columns. Some people find it useful to include a column where they cross reference CPD goals, needs or activities to show links with:

- organisational objectives - this is particularly useful if it is the policy of your organisation to link development activities with a business or development plan or if your organisation is an Investor in People
- local or national government initiatives such as Best Value, cultural strategies etc
- other professional development instruments such as an appraisal form or your CPD Log and CPD Summary.

Participants in CPD schemes in other professions often find it useful to include columns with headings such as:

- What resources or support will I need?
- What will my success criteria be?

Individual approaches are encouraged. Make your CPD Plan reflect your circumstances, style and needs. This is about your career, your future, not filling in a form.
STEP 7: TALKING IT THROUGH

How do I know it will work?
Now you have drafted your plan you need to talk it through. The plan will reflect your choices and the direction you want to take. It may need a little adjustment but how will you know that? You need the opinion of people on your side, loyal, trusted, interested advisers whose experience you can capitalise on.

There are many sources of help available to assist you in undertaking your development. Do not be afraid to ask. In the knowledge that helping others is a way of developing themselves, those you ask will usually be happy to help. People to ask could include: staff at the MA, staff at regional agencies, friends, family, training providers, your line manager at work, your mentor, peers, members of specialist groups or networks and work colleagues.

Use your manager
It may be appropriate to involve your line manager and/or your training and development or personnel manager. If you are part of a performance management/appraisal system, this can link effectively with your CPD. Your organisation may also be able to provide resources and/or opportunities to help you achieve specific development goals that can be written into your plan.

For more information, see the Museums Association CPD information sheets: How to link the Museums Association's Continuing Professional Development (CPD) with a Performance Management/Appraisal System and How Line Managers can support the Museums Association's Continuing Professional Development (CPD).

Contact the Museums Association
The Museums Association professional development staff has specific responsibility for the CPD scheme and will provide information and guidance to all individuals participating in it. The Museums Association also runs workshops that will help you to draw up an effective plan and enable you to discuss ideas with others.

Use your colleagues
Your colleagues may offer informal support, particularly if they are undertaking CPD themselves. Together you may want to set up an informal support/learning group. Such a group may already exist, perhaps under the auspices of a Regional Agency. Alternatively, the Museums Association can help you to contact other people in your area who are also undertaking CPD.

Other sources of support
Your Regional Agency or Federation may be able to offer you a variety of resources and activities that will support your CPD. Your family and friends will, of course, also provide emotional and practical support.
Find a mentor
A mentor is someone who is knowledgeable, experienced and well informed, who can help guide you along your chosen path. Mentors are enablers, helping you to achieve your goals and reach your full potential. Usually a more experienced colleague from a different organisation, and often a different discipline, but from the same geographical area, a mentor who looks at your plan can:

- suggest other ways to achieve your goals
- alert you to learning and networking opportunities
- get you to think about activities and choices that fit your experience
- help you to see your work in the context of sector-wide developments
- help you to anticipate problems and question assumptions
- guide you to incremental successes
- validate and affirm your knowledge, contribution and successes

If you are working towards AMA the Museums Association will help you find a suitable, trained AMA mentor. Before it is submitted to the Museums Association your CPD Plan must be approved and signed by your mentor.

If you are working towards AMA your appraisers will comment on a draft CPD Plan that you have submitted, and which you are expected to amend on the basis of the feedback given at your appraisal. In addition you are encouraged to join or start peer-mentoring groups with other FMA candidates or participants in CPD Plus.

If you are participating in CPD Plus your CPD Plans and Summaries must be signed by another individual undertaking or suitably qualified to assess CPD. The Museums Association can help you join or form a small, informal learning set of other museum professionals, although there is no formal requirement to belong to one.

Further information on the support of others is outlined in the Museums Association CPD information sheet: How to make the most of mentors, peer mentoring groups and learning sets.
STEP 8: SUBMITTING YOUR CPD PLAN

**When can I start?**
Once you have completed your CPD Plan, you should submit it to the Museums Association. The Museums Association will acknowledge receipt of your CPD Plan and any other documentation that you may have been asked to submit to accompany it.

Any significant revisions of the CPD Plan should be sent to the Museums Association at the time they are made.

For those working towards **AMA**, your completed CPD Plan should be sent to the Museums Association as soon as your mentor has countersigned it. The Museums Association will make recommendations if it is felt that more information or activity is required. You are strongly advised to act on these recommendations. The two-year period of CPD which you are required to complete starts from the date of the CPD Plan's submission to the Museums Association.

For those working towards the **FMA** an initial CPD Plan forms part of a Fellowship Application including references, a CV and other documents. Your appraisers will make recommendations that form the basis of an agreed revision to be submitted within two weeks of the appraisal. The CPD period agreed at the Fellowship Appraisal runs from the date of the revised CPD Plan's submission to the Museums Association.

For those participating in **CPD Plus** you should submit a CPD Plan and Summary by the deadline every two years. Your CPD record will then be formally acknowledged by the Museums Association as being up to date. There is no charge for this service. Additional, detailed assessment of your CPD Plans and Summaries is available for a fee.
STEP 9: REVISING YOUR CPD PLAN

How do I change my plans?
The CPD Plan is useful only if it is relevant to your circumstances. If your work or personal circumstances change, you develop new aspirations, or change your mind about what is needed, you should amend the CPD Plan. It may be that certain planned activities are no longer available or perhaps new opportunities present themselves. It is a good idea to review and amend your plan at least every 12 months. Over a two-year period it would be unusual for a plan to remain unaltered.

Any significant changes should be sent to the Museums Association at the time they are made.

If you are working towards AMA any significant changes you make to your CPD Plan should be agreed with your mentor before being sent to the Museums Association. When submitting your final application for AMA prior to Professional Review, you should submit both original and revised CPD Plans. It will help you and those who assess them if you number and date your CPD Plans. Your original plan is plan 1, a revised plan is plan 2, a further revision is plan 3 and so on. It is also helpful if you indicate the period each plan covers eg January 200x to December 200x.

If you are working towards FMA changes to your CPD Plan after the Fellowship Appraisal need to be agreed with your lead appraiser. Your revised plan should address the actions agreed at Appraisal as necessary for the achievement of Fellowship. It will help you and those who assess and keep copies of your plans if they are clearly labelled and dated and if they indicate the periods they cover. It is important to distinguish, for example, a pre-appraisal draft plan from post-appraisal and subsequent agreed revisions.

If you are participating in CPD Plus you will find it helpful to discuss changes to your CPD Plan with another individual undertaking or suitably qualified to assess continuing professional development. By the specified deadline every two years you should submit a CPD Plan and summary signed by such an individual. CPD Plans that you revise between biannual deadlines need not be submitted to the Museums Association.
STEP 10: CARRYING OUT YOUR CPD PLAN

How will I make it happen?
Out of sight is out of mind. If you file it away you will put it off. Keep it where you can see it. Look at it every week if not every day. Your CPD Plan is a working document. You will need to refer to it regularly over the whole of the period it covers and revise it. You will also need to set time aside at the end of the CPD period to take stock. Take out your CPD Log and refer to it in considering each item on the plan. Have you achieved each of your goals?

Ticking them off is a rewarding experience. You will probably be surprised at how much you have achieved! If there are any goals you have not achieved, consider why. Your answer will help you decide whether to carry that goal forward onto your plan for the next period, to abandon it or to modify needs and activities in relation to the goal - perhaps to make them more realistic or relevant to changed circumstances.

Overall you need to consider how well you have got on, and what has helped or hindered you. If you have not achieved most of what you set out to do you will at least have learnt something about your approach and that you may need to alter it. Remember that getting through a plan or coming to the end of a CPD period is not the end of your CPD. There is no end. Get planning again! CPD is a continual process of planning, doing, recording and reviewing.