



# Proposed Guide to Continual Professional Development (CPD)

## REGISTRANT MEMBERS

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## 1. WHAT IS CPD?

CPD stands for Continual Professional Development and is the method of recording and monitoring the skills, knowledge and experience that you gain from undertaking your work.

You are recording what you did and what you learnt from carrying out a particular task. Through recording and reflecting on your CPD activities you will review the following:

- what skills and knowledge you needed
- what you learnt from undertaking the task, and,
- any training or future development need identified.

In other words, CPD monitoring helps you;

1. **record**
2. **review**, and,
3. **reflect** on the work undertaken.

### Why do you need to record it?

If you want to be the best, you need to make sure your skills and knowledge are up-to-date. CPD enables you to reflect on and answer the question, 'how can I do this job better?'

There is an obligation to maintain and review your skills and knowledge embedded in the Code of Professional Conduct, which states that Registrant Members of the Society will;

- take every reasonable opportunity to maintain and enhance knowledge and competence within their field of work. *Every Registrant Member is required to maintain up to date Continual Professional Development (CPD) records. A minimum 6 hours must be recorded annually.*

### 1.1 What do we look for? The Competencies

The competencies set out what core knowledge and skills our members should be able to evidence. The competencies are:

- Ability to communicate with target customers
- Disability awareness
- Knowledge of specific conditions
- Anatomy / Physiology
- Moving and Handling
- Health and Safety
- Infection Control
- Regulatory implications/understanding
- Technical/engineering
- Knowledge of products/equipment groups supplied and or supported by employer
- Knowledge and awareness of similar competitive products
- Indepth knowledge of complex equipment supplied and or supported by employer
- Awareness of statutory and charitable support and or signposting

Depending on the job role, some of the competencies are deemed to be Essential, some are Desirable while others are deemed to be not relevant for that job role. You may find that you identify with more than one job role, this is fine.

**Essential**

We would expect to see a demonstration of this area of competency. For example, the need for installers, repairers and all others in a technical role to have received health and safety training is clear. The installation, maintenance, repair and removal of technical equipment may require knowledge of such issues as plumbing, electrics, building regulations for example. A person hired in a purely customer service role that is not undertaking these kinds of duties would not be expected to evidence this.

**Desirable**

If an area of competency is marked as desirable we do not require that that area of competency is demonstrated but would still encourage you to undertake the training. Although it is not deemed as essential it is felt that you would still benefit from gaining this area of knowledge and skill.

**Not applicable**

This area we do not require to see demonstrated at all, however, again please do not feel that you cannot work towards gaining knowledge and skills in this area of competency.

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## The Competency grid

Areas of competency	Practical job roles in Assistive Technology			
	Deliverers, Installers, Repairers, Service Engineers, Technicians	Customer service, Administrators	Advisors, Demonstrators, General salespeople and advisers, Dispensers,	Assessors, Prescribers, Specialist salespeople and advisers, Instructors/Trainers
Ability to communicate with target customers	Essential	Essential	Essential	Essential
Disability Awareness	Essential	Essential	Essential	Essential
Knowledge of specific conditions	Desirable	Desirable	Desirable	Essential
Anatomy / physiology	N/A	N/A	Desirable	Desirable
Moving and handling	Essential (emphasis on equipment)	N/A	Essential	Essential (Emphasis on People)
Health & Safety	Essential	N/A	Desirable	Desirable
Infection Control	Desirable	N/A	Desirable	Desirable
Regulatory implications/ understanding	Desirable	N/A	Desirable	Essential
Technical / engineering	Essential	N/A	N/A	Desirable
Knowledge of products/equipment groups supplied/supported by employer	Essential	Essential	Essential	Essential

Knowledge/awareness of similar competitive products	Desirable	Desirable	Desirable	Desirable
Indepth knowledge of complex equipment supplied/supported by employer	N/A	N/A	Desirable	Essential
Awareness of statutory and charitable support / signposting	N/A	Desirable	Desirable (Manufacturer/national retail)  Essential (local retail)	Desirable

## 2. RECORDING YOUR CPD (How do I evidence the competencies?)

As a Registrant Member of the Society you are required to maintain a minimum of **6 hours of CPD spread over a 12 month period.**

This means that we want you to evidence at least 6 hours of learning related to your job role over a period of a year. You are not being asked to evidence 6 hours for every competency that is deemed relevant for your role.

For example, knowledge of health and safety may be highlighted as an essential area of competency for your role but that doesn't mean that we expect to see 6 hours of training in this area every year. It is enough to see that you have had training in that area recently and that you intend to refresh your knowledge and skills in this area in the future when required.

To evidence the competencies a list has been prepared of 9 types of activity that you may undertake or engage in that you may learn new skills and knowledge from. Things like going to a seminar, undertaking a training course or reading articles in trade magazines.

The 9 categories of CPD activity are as follows:

- In-company development and business skills                   max 4hrs
- Product training   max 4hrs
- Customer understanding   max 2hrs
- Short training courses and workshops                             max 6hrs
- Formally accredited courses   max 6hrs
- Imparting knowledge   max 2hrs
- Conferences and exhibitions   max 2hrs
- Personal reflection    max 2hrs
- Professional body events.    max 2hrs

The categories and maximum hours attributed to them can be viewed in one document, the *Acceptable Practitioner Experience Policy*, available to download from [www.hatsoc.org/professionaldevelopment](http://www.hatsoc.org/professionaldevelopment).

## 2.1) CPD Categories

### 1 In-company development and business skills

You are allowed to claim a maximum of **4 hours** of the overall 6 hours for this category.

In considering your in-company development, and the overall development of your business skills, the following may be relevant:

- training provided by manufacturers
- training provided by your employer
- training provided by sales representatives
- work shadowing and role share
- taking on new roles and responsibilities
- promotion
- line management experience

Think about the ways that your professional development at work was advanced and recognised. If you have a formal appraisal system in place, this should provide recognition for your development within an organisation. If your employer does not undertake a formal appraisal system, how else is professional development recognised? Maybe your employer operates 'Employee of the Month' or 'Salesperson of the Year' schemes that are based not only on sales but customer satisfaction feedback, teamworking and use of initiative for example.

Evidence of the above could be provided with a letter from your employer and certificates of achievement or attendance for example.

### 2 Product training

You are allowed to claim a maximum of **4 hours** of the overall 6 hours for this category.

This could be;

- product training provided by manufacturers
- product training provided by your employer
- product training provided by sales representatives.

When detailing the product training you undertook, consider how it helped you with your current role or prepared you for dealing with new responsibilities. Maybe you were undertaking the training so you could be the 'expert' or 'go-to person' with regards to a particular type of product you are responsible for. Maybe you were promoted and had responsibility for selling or maintaining a completely new kind of product or service.

Evidence can be provided with a letter from your employer confirming that the training was provided or certificates of attendance and achievement.

### **3 Customer understanding**

You are allowed to claim a maximum of **2 hours** of the overall 6 hours for this category.

You can evidence two areas of skills and knowledge through this category;

- understanding the medical and social needs of your customer
- providing excellent customer service.

The above could be evidenced through training on subjects such as disability awareness or knowledge of specific conditions (eg multiple sclerosis, dementia or sight loss).

A system of documenting customer satisfaction (feedback cards, letters of thanks etc.) may lead to recognition such as 'Employee of the Month'. You might have taken the initiative to introduce a new procedure or method of working that improved the customer experience. Maybe you received praise for the way you handled a customer complaint or concern?

This can be supported by a letter from your employer, examples of customer satisfaction forms or correspondence, training certificates etc.

### **4 Short training courses and workshops**

You are allowed to claim a maximum of **6 hours** of the overall 6 hours for this category.

Short courses and workshops that develop your skills for your specific role are relevant here. This training may be more technical in nature and more specific to your role, such as asbestos training or sales training for example.

Again, evidence of your attendance can be provided by certificates of attendance and achievement. A letter from your employer can explain why the training was relevant.

### **5 Formally accredited courses**

You are allowed to claim a maximum of **6 hours** of the overall 6 hours for this category.

These courses are more involved than the short training courses and workshops and will likely be more focussed on future professional career development in addition to aiding you in your specific current role. Qualifications such as BTEC, NVQ, undergraduate degree and post graduate degree are relevant.

Achievement of the qualification can be evidenced with a copy of your qualification certificate.

### **6 Imparting knowledge**

You are allowed to claim a maximum of **2 hours** of the overall 6 hours for this category.

To evidence this category you might author published papers or articles, in peer reviewed publications, on subjects relevant to your role and expertise. Maybe you take part in a professional networking forum that encourages discussion and debate about professional matters that concern your role or sector? Delivering presentations and seminars in-house and externally.

Evidence can be provided through copies of the articles or papers written. Evidence of your membership of a specialist group and your involvement (your involvement listed on the meeting agenda). Taking part in BHTA Section meetings. Copies of the training and presentations you have delivered.

## **7 Conferences and exhibitions**

You are allowed to claim a maximum of **2 hours** of the overall 6 hours for this category.

Attendance at conferences, exhibitions and trade shows relevant for your role.

Provide detail on the record sheet about how the event was relevant. Did you attend any seminars? Was the event trade only and or customer focussed? Did the event provide you with any professional networking opportunities or help develop your customer relationships?

Evidence of your attendance at the event can be provided with a copy of your name badge or booking confirmation/letter. Certificates of attendance from seminars and workshops you attended.

## **8 Personal reflection**

You are allowed to claim a maximum of **2 hours** of the overall 6 hours for this category.

Private study includes learning new skills and/or improving performance and knowledge, eg through online research or reading publications. This is about you taking the initiative to investigate something and not company led training. Maybe you researched a different method of working, went online or read a publication to find a solution to a problem you had.

This can be evidenced by noting the source, date and documenting the relevance of the information obtained.

## **9 Professional body events.**

You are allowed to claim a maximum of **2 hours** of the overall 6 hours for this category.

Events, meetings, seminars and networking opportunities run by professional bodies such as trade associations, Royal Colleges and other regulated bodies.

As a member of an accredited or regulated professional body, you might attend a members only seminar on a specific topic relevant to your role or profession. Attendance of member meetings such as British Healthcare Trades Association (BHTA) section meetings for example.

A certificate of attendance can be submitted or a copy of the minutes. Presentation slides for a presentation you delivered or details of a seminar you organised. If you were at a professional networking event, explain how this helped you professionally. Who did you speak to? Did you prepare by researching who would attend? The building cross-industry relationships with competitors?



## 2.2) Completing the annual record sheet

The CPD Review Sheet is available to download from the Society website at: [www.hatsoc.org/professionaldevelopment](http://www.hatsoc.org/professionaldevelopment)

As a Registrant Member, at some point in your membership you will be randomly selected to submit a completed CPD Review Sheet to the Society.

Please remember to keep evidence of your CPD safe, you will need to submit it in support of the hours and activities claimed in the CPD Review Sheet, and, you will also want to refer back to it when completing the form, you will not want to be relying on memory a year down the line!

The following types of evidence may be relevant and helpful for completing the form;

- certificates of membership for professional bodies
- certificates of attendance from training courses and seminars
- emails evidencing bookings onto courses and events
- appraisal documentation such as development reviews
- copies of articles that you have read and learnt from
- copies of articles you have written for peer reviewed publications
- copies of proof of qualifications you have achieved

You will submit copies of your evidence when you submit your CPD record at your annual renewal.

**Please note** that the Society will not return any documents to you so please do not send original documents. Copies and scans are acceptable.

Please remember, when reviewing the CPD activity undertaken, to reflect on what you feel you achieved, what you learnt and what you feel you still need to learn.

You may write as much or as little for each category as is relevant, depending on your job, some of the categories will be more relevant than others, that's fine, you do not need to evidence CPD activity for all 9 categories. The most important thing is that this is a true and accurate reflection of what you actually did.

You do not need to list what you do on a daily basis, rather, provide a summary of how you met the required hours over the course of the year through undertaking the activities described.

Before the record sheet is submitted, you will need to ensure that your current line manager, or previous line manager if you have recently changed jobs, have signed off the sheet as a true and accurate reflection of what was undertaken. This can be done on the second page of the form.

### **2.3) Breaks in employment**

People take breaks in their employment for a number of reasons, the most common being for maternity, paternity, travelling, health reasons and redundancy. If you find yourself in a situation where you are unable to maintain and record your CPD activity, please contact the Society to explain the situation via CPD@hatsoc.org or via the Accreditation and Professional Development Manager on 020 7702 2141, correspondence will be treated in confidence.

The Society will work with you to agree the best way forward given the nature of your situation.

### **2.4) Additional needs and support**

If you have learning difficulties, physical disability or feel there is any other reason why you may need support to undertake the CPD process please contact the Accreditation and Professional Development Manager, in confidence, on 020 7702 2141 to discuss your situation.

### **2.5) Types of CPD activity**

CPD isn't just about attending training courses. There are lots of potential sources of CPD which can be;

#### **Reading:**

- Reading specialist trade magazines and press can provide interesting and relevant articles about new technologies, new methods of working and changes of legislation
- Writing articles for peer reviewed publications

#### **At work:**

- Attending meetings where new methods of working are discussed and implemented
- Chairing meetings relevant to your work
- Work shadowing and job-swapping with colleagues
- Training new members of staff
- Mentoring new members of staff
- Deputising for your manager
- Taking on a new role and new responsibilities
- Networking and attending seminars
- Learning from accidents at work
- Attending trade shows, talking to members/customers and attending seminars
- Talking to the customer – what do they want and need?
- Reviewing feedback from your manager – appraisals, meeting performance targets etc.
- Reviewing feedback from your customers – feedback forms, comments boxes etc.

#### **Outside work:**

- Voluntary work
- Networking and seminars
- Training not specifically related to your role, but provides you with skills that can be used in your role

#### **Training courses:**

- Attending in-house training courses at work
- Attending external training courses hosted by other companies

### **3. THE PROCESS**

- If you are selected to submit evidence that you are maintaining your skills and knowledge you will be required to complete and submit the CPD Review Sheet to [CPD@hatsoc.org](mailto:CPD@hatsoc.org)
- The review sheet will be kept on file by the Society and checked to ensure that the minimum number of hours have been demonstrated and that you are maintaining your skills and knowledge in the required competency areas.

#### **How the Society reviews your CPD**

The Secretariat will read through the CPD record and look for evidence of the following 3 aspects:

1. The minimum amount of 6 hours of CPD activity required has been demonstrated
2. The activity is relevant for the role being undertaken
3. That it is clear that undertaking the CPD activity has helped you develop new skills and knowledge.

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