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Interactive CPD Toolkit

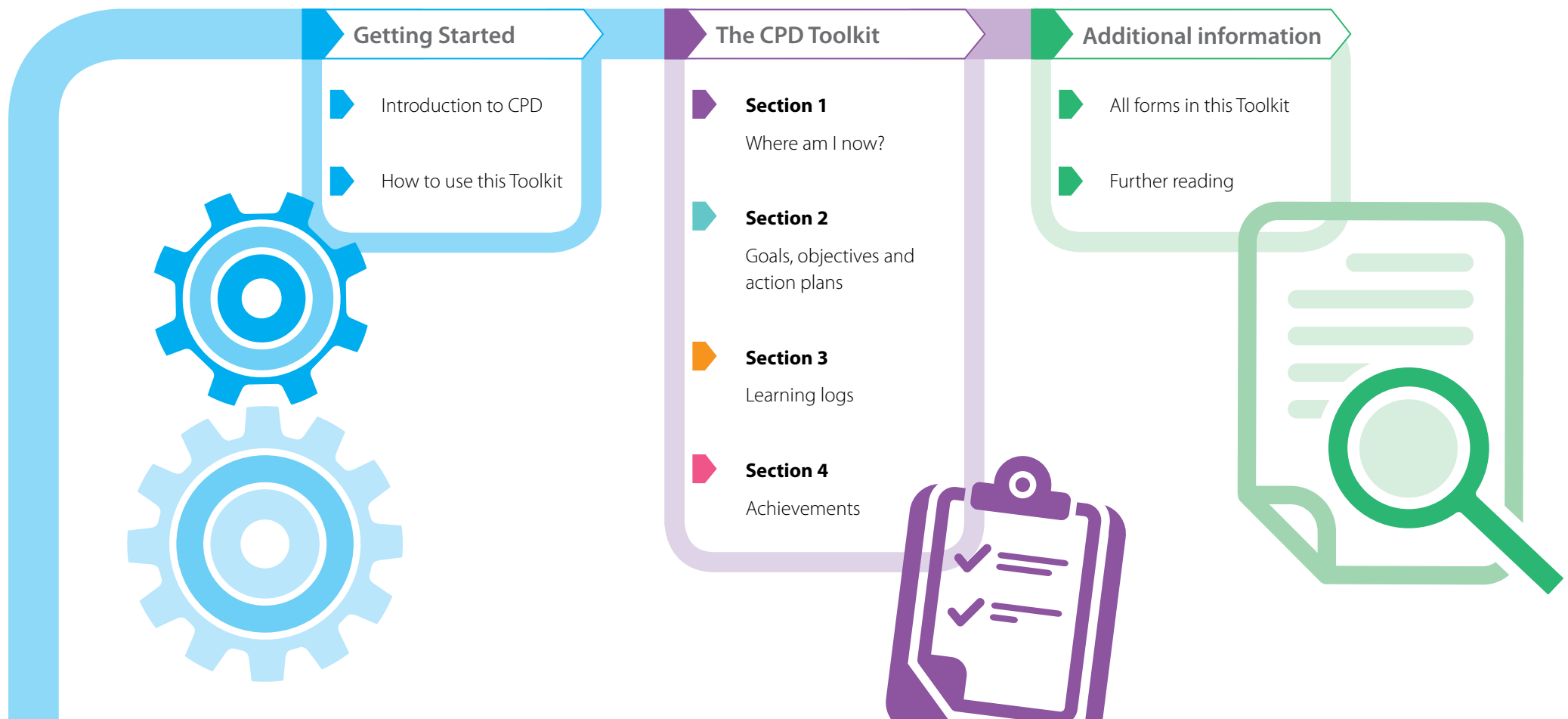
A Step-by-Step Guide to Progress your Career and Record your Continuing Professional Development (CPD)

Main Menu

This document contains both guidance and forms that can be filled in on screen or printed out and completed by hand.

Use the navigation to take you through it in order, or dip in and out of it as your career progresses to monitor your progress and keep it on track.

Click on the relevant arrow below to begin.



Introduction

Continuing Professional Development (CPD) is a recognised, systematic way of tracking your professional development on an ongoing basis. It also helps you to document and reflect on any learning or training that you either undertake formally or acquire informally.

There are 5 aspects to CPD:

1

Recording

You need to record the steps in your development as a professional, including training events and informal learning. Development is not necessarily about the 'core' content of your profession, as doing your job will require other skills and abilities such as communication or information management.

These are often the skills you acquire in the course of your work, which help you to do your job and build your overall capability.

2

Reflecting

The very activity of writing something down will help you to think about it. Reflecting on events and experiences helps you to integrate the learning and see how you may be able to use it in other situations.

3

Tracking

If you have recorded your learning, you can see how you are progressing and developing and where the gaps in your capabilities are. Then you can set the direction and objectives for future learning and training.

4

Planning

Planning is taking the next step towards your objective and about making the direction more concrete. If you see a gap in your abilities, you can plan your next move, whether it is shadowing someone with more experience, going on a training course or just talking about it to other people.

5

Reviewing

Reviewing your development objectives in a systematic way helps you to measure your progress and demonstrates that you have achieved your goals.

Why do it?

Completing your CPD Toolkit regularly and reviewing your progress will help you to set a direction and keep your development going the way you want it to. You can also use it as a record which will:

- Remind you of what you have learned and how far you have come
- demonstrate your enthusiasm for developing yourself to your employer or prospective employers
- provide examples and scenarios for appraisals and interviews.

How to use this Toolkit

There is no 'best' way to use the forms in this Toolkit as CPD is not a fixed or regulated process.

Some guidance is provided, but it's up to you to use it in the way that suits you best.

The CPD Toolkit

The Toolkit is divided into four main sections, which comprise a page of guidance notes followed by one or two forms to be completed by you.

You can start with any section you like, although it may be useful to begin at Section 1.

Completing the forms

You can complete the forms either by printing them out or by typing directly in the interactive electronic version. This is the start of your CPD portfolio which, if you keep using it, will build into a useful career resource.

Reviewing the forms

You can keep your forms in either a physical or an electronic folder. You can then review them at any time you need and keep recording your professional progress.

Additional forms

You can make copies of the forms as many times as you want if you print them out. If you type into the electronic version, the grids will expand while you are typing and additional forms have been included.

Navigating around this Toolkit

On the electronic version, you can easily go to any section by clicking the coloured boxes on the Main Menu.

You can use the blue bar on each page [top right] to navigate back to the Main Menu.

To view the forms, you can either go straight to them by clicking "All forms in this Toolkit" on the Main Menu, or you can go to the forms individually, via each section as you complete them.

You can always go back to the notes/instructions for each form by clicking "Back to notes" and go to the next section by clicking "To next section".

The sections are:

Section 1: Where am I now?

Form in this section:

- Where am I now? – a snapshot of your current professional position

Section 2: Goals, objectives and action plans

Forms in this section:

- Statement of Intent – long term overall goals
- Objective and Action Plan for each objective

Section 3: Learning logs

Forms in this section:

- Formal Learning Log – a record of your formal learning/training
- Informal Learning Log – a record of your informal learning

Section 4: Achievements

Forms in this section:

- Formal Achievements Record
- Informal Achievements Record



The forms in this Toolkit

Where am I now?

Where Am I now?

Goals, objectives and action plans

Statement of Intent

Objective and Action Plan

Learning logs

Formal Learning Log

Informal Learning Log

Achievements

Formal Achievements Record

Informal Achievements Record

Where am I now?

Use the form within this section to take a snapshot of your current position to take stock of where you are now.

Duplicate forms are included so you can then review it and update it regularly from other sections.

How to use this form, "Where am I now?"

The form is divided into five columns:

1

Job-specific skills and knowledge

These are the core skills and knowledge that is directly related to your job.

Examples include:

- analysing data
- lecturing/teaching
- specialist topic knowledge

If you don't have a job specification to work from, think of what you do every day in your job and write down the knowledge and skills relating to each activity.

2

Capabilities

Capabilities or competencies are different from specific skills as they are not so focused and have more to do with what you are like.

You may or may not use them in your current job. Your capabilities are always transferable to other situations as they are generic.

Examples include:

- influencing and persuading people
- attention to detail
- initiating ideas

3

Transferable skills

These are skills you have that are transferable to other jobs. Some of them will come from your job-specific skills list and others from previous jobs or outside interests.

Ask yourself whether you could use it in another job.

Examples include:

- presenting ideas formally
- organising events
- managing a budget

4

Work Values

Your values have an impact on what you do. If your values are not compatible with the job you do, you may not be happy in your work.

Examples include:

- no commercial imperatives
- seeing results and making a difference
- security

5

Interests

This is a list of areas that genuinely interest you and that you enjoy both in and outside of work and many may include specific hobbies.

Examples include:

- your subject area
- helping people learn
- researching and writing

Where am I now?

[Form 1 of 3]

Position held**Date**

Job-specific skills and knowledge

Capabilities

Transferable skills

Work Values

Interests

Where am I now?

[Form 2 of 3]

Position held**Date**

Job-specific skills and knowledge

Capabilities

Transferable skills

Work Values

Interests

Where am I now?

[Form 3 of 3]

Position held**Date**

Job-specific skills and knowledge

Capabilities

Transferable skills

Work Values

Interests

Goals, objectives and action plans – Part 1

The two forms in this section will help you to set development objectives and plan actions to achieve them.

The first form is a **Statement of Intent**, which will help you to record a general statement of intent, documenting your longer-term goals and, initially, three areas for development.

The second form, **Objectives and Action Plan**, is about setting development objectives and formulating action plans in the shorter term, starting from now.

How to use the “Statement of Intent” form

This form has 6 parts:

Parts 1-3: Long-term goal(s)

These are goals that you are aiming to achieve in the long-term – in three, five or even ten years time. This need not be very precise, as you may change it as you go along. You may also be happy to leave the future open-ended and not have a longer-term goal at all. However, it does help if you have some idea of where you are going so that it provides a framework for your overall development.

Part 4: Strengths

Make a note of three areas or activities in which you feel at your best and most comfortable.

Part 5: Weaknesses

Make a note of areas that you feel need further development.

Part 6: Areas for development

From your areas of strengths and weaknesses, make a note of **no more than three** areas that you would like to develop. These can either be strengths that you want to build on or weaknesses that you want to strengthen. You can then turn these into clear objectives, one by one, on the next form.



Statement of Intent**Long-term overall goals**

What would you like to be doing, professionally, in 10 years time?

What would you like to be doing, professionally, in 5 years time?

What would you like to be doing, professionally, in 3 years time?

Three strong areas – what are you best at?

Three weaker areas – what would you like to be better at?

Three areas you would like to develop further

Goals, objectives and action plans – Part 2

The Objectives and Action Plan form is about setting development objectives and formulating action plans in the shorter term, starting from now.

Duplicate forms are included so you can return to this exercise at regular intervals or as required.

How to use the “Objectives and Action Plans” form

Don't set yourself more than three development objectives at one time – you won't be able to achieve them. Building on the three areas for development you identified in the last part of this section, you can clarify your objectives. Use one form for each objective.

Part 1: Setting Development Objectives

Your development objectives are short to medium-term, and focus on particular areas for development. A development objective needs to be precise. It's more than just a statement of intent; it's a clear and focused goal. Every objective needs to be **SMART**:

Specific – exactly what you want to be able to do

Measurable – exactly what you will be able to do or do better when you have achieved it

Achievable – based on your capability and the constraints of your situation

Realistic – based on the constraints of your work, time and commitments

Time-bound – with a firm date for achieving it.

Part 2: Action plans

Action planning also has to be specific, realistic and time-bound. You need to:

- Start with your SMART development objective
- Identify your overall strategy and the learning methods you think would be appropriate. For example, go on a training course, shadow a colleague etc.
- Plan the first step (for example, speaking to your line manager), and plan to do it as soon as possible
- Decide on a review date for the plan. This may be the same as your development objective review date. Put it in your diary and do it, even if you haven't reached the objective - you may need to revise your plan.

You also need to make a note of the resources (people, money, training) you need to be able to put your plan into action.



Objective and Action Plan [Form 1 of 3]

Part 1: Objective

Your development objective (is it SMART?)

What you will be able to do or do better when you have achieved it?

Who else will benefit?

When will you achieve it by?
A specific date.

Part 2: Action Plan

Overall strategy (the learning method)

Resources (that you will need to be able to achieve it)

First step (what will you do today, tomorrow or next week?) Write a date.

Review date

Objective and Action Plan [Form 2 of 3]

Part 1: Objective

Your development objective (is it SMART?)

What you will be able to do or do better when you have achieved it?

Who else will benefit?

When will you achieve it by?
A specific date.

Part 2: Action Plan

Overall strategy (the learning method)

Resources (that you will need to be able to achieve it)

First step (what will you do today, tomorrow or next week?) Write a date.

Review date

Objective and Action Plan [Form 3 of 3]

Part 1: Objective

Your development objective (is it SMART?)

What you will be able to do or do better when you have achieved it?

Who else will benefit?

When will you achieve it by?
A specific date.

Part 2: Action Plan

Overall strategy (the learning method)

Resources (that you will need to be able to achieve it)

First step (what will you do today, tomorrow or next week?) Write a date.

Review date

Learning logs – Part 1

There are two forms in this section, both of which are useful for tracking your formal and informal learning and helping you to reflect on an ongoing basis rather than at regular intervals.

Duplicate forms are included so you can return to these exercises at regular intervals or as required.

How to use the “Formal Learning Log”

This is where you make a note of any formal training events, seminars or conferences you attend, with any comments about it and anything you learned other than the main topic.

This form is divided into 5 columns:

Event

Date

Topic

Your comments

Additional Learning



Formal Learning Log [Form 1 of 5]

Event

Date

Topic

Your Comments

Additional Learning

 **To next form**

Formal Learning Log [Form 2 of 5]

Event	Date	Topic	Your Comments	Additional Learning

Formal Learning Log**[Form 3 of 5]**

Event

Date

Topic

Your Comments

Additional Learning

Formal Learning Log**[Form 4 of 5]**

Event

Date

Topic

Your Comments

Additional Learning

Formal Learning Log [Form 5 of 5]

Event	Date	Topic	Your Comments	Additional Learning

Learning logs – Part 2

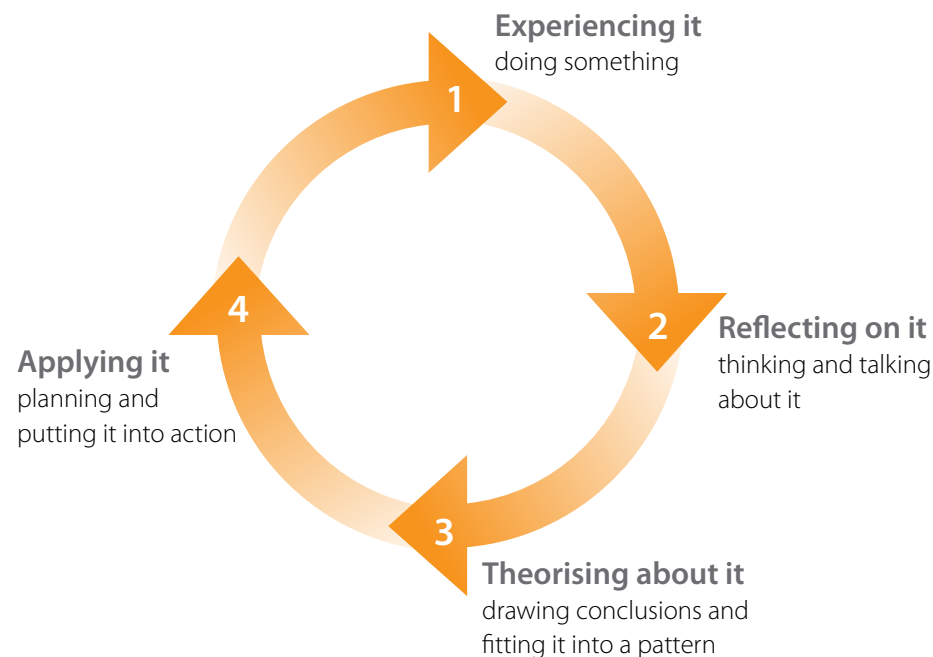
This form is to help you document and reflect on any incidental learning that you pick up as you go along.

Duplicate forms are included so you can return to these exercises at regular intervals or as required.

How to use the “Informal Learning Log”

Detailed research over the years has shown that we learn by doing something, from experience*.

This ‘experiential learning’ generally follows a cycle made up of four stages:



The learning experience can begin from any of the four stages. Different people are happier with different stages of the cycle (this is your preferred learning style) and circumstances also dictate the stage that learning starts from. It makes no difference to the outcome of the learning, as long as all stages are given equal weight.

No one stage on its own makes a whole learning experience. All the stages are important and each leads onto the next. When we learn as we go along, we often miss out the ‘reflecting’ stage in our dash to get on to the next thing. The Informal Learning Log helps you to do this as you note down your experiences.

Some examples of informal learning activities include:

Informal learning activities at work

- Job shadowing
- Job swapping/job rotation
- Coaching and mentoring
- ‘Buddying’, peer-coaching, ‘Sitting with Nellie’

Sources of informal learning

- Learning from successes
- Learning from mistakes
- Learning from other people
- Learning from feedback

Learning from feedback

Feedback on what you do, how you do it and how it is experienced is the single most effective tool for learning, and is part of every informal learning experience. However, despite this – and despite the amount of potential feedback there is – we often shy away from it.

Top tips for receiving feedback

1. Ask for it! If you ask, you’re prepared and you won’t be caught off-guard
2. Listen carefully to what is being said
3. Let the person finish and don’t interrupt - you may miss some praise!
4. Don’t rush to justify your actions
5. Ask questions to clarify anything you don’t understand
6. Ask for suggestions on how you could have done better
7. Listen for the good as well as the bad
8. Think about it – and get other people’s feedback
9. Remember that it’s up to you whether or not you take action as a result

Informal Learning Log [Form 1 of 5]

Experiencing it

Situation

What Happened?

Experiencing it

Your Comments

Theorising about it

What you learned

Applying it

How will you apply it?

Informal Learning Log [Form 2 of 5]

Experiencing it

Situation

What Happened?

Experiencing it

Your Comments

Theorising about it

What you learned

Applying it

How will you apply it?

Informal Learning Log [Form 3 of 5]

Experiencing it

Situation

What Happened?

Experiencing it

Your Comments

Theorising about it

What you learned

Applying it

How will you apply it?

Informal Learning Log [Form 4 of 5]

Experiencing it

Situation

What Happened?

Experiencing it

Your Comments

Theorising about it

What you learned

Applying it

How will you apply it?

Informal Learning Log [Form 5 of 5]

Experiencing it

Situation

What Happened?

Experiencing it

Your Comments

Theorising about it

What you learned

Applying it

How will you apply it?

Achievements – Part 1

This section is where you document your achievements.

The two forms in this section will help you in an appraisal or a job interview. They will also remind you of your successes.

Duplicate forms are included so you can return to these exercises at regular intervals or as required.



How to use the “Formal Achievements Record”

The form on the following page provides a simple way of documenting your formally recognised achievements.

Examples include:

- **A new job**
- **Promotion**
- **Extra responsibilities**
- **Bonuses**
- **Successes**
- **A particularly good review or appraisal**

Formal Achievements Record [Form 1 of 3]

Achievement

Date

Your Comments

Formal Achievements Record [Form 2 of 3]

Achievement

Date

Your Comments

Formal Achievements Record [Form 3 of 3]

Achievement

Date

Your Comments

Achievements – Part 2

This form will help you to record informal successes at work: situations that may not necessarily be formally recognised, but that demonstrate your competence and ability to learn.

How to use the “Informal Achievements Record”

This form is arranged in four columns:

Situation: make a note of the situation you were initially faced with

Task: identify what you had to do

Action: describe the action you took

Result: describe the result of your action



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Example

Situation

A team member's poor attitude and absenteeism is becoming a problem for the team.

Task

To find out what is causing the problem, help her to overcome it and improve performance.

Action

1. Asked my manager's advice on how to approach her.
2. Monitored her days off sick for a month (irrefutable evidence).
3. Talked to her in private & asked what I could do to help.
4. Offered more involvement in decisions affecting her.

Result

She's more involved and motivated. Attitude is much better and 100% improvement on absenteeism this month.

This formula helps you to think logically through a situation where your actions have resulted in a successful outcome.

It helps if you complete this record as soon as possible after the event as you may not remember it a few weeks (or months) down the line.

Informal Achievements Record [Form 1 of 3]

Situation

Task

Action

Result

Informal Achievements Record [Form 2 of 3]

Situation

Task

Action

Result

Informal Achievements Record [Form 3 of 3]

Situation

Task

Action

Result

Further reading

You may like these other ebooks from [jobs.ac.uk](#):

[Career Planning ebook](#)

Choosing to get a new job or to focus on regaining the love for your current job will benefit from a structured approach and this ebook is going to help you do just this. Follow the 11 steps, complete the simple exercises and feel more confident in your decision making.

[Career Planning for PhDs ebook](#)

The PhD is increasingly opening doors to a whole range of opportunities, particularly if you develop the rounded experience, knowledge and skills required by employers. This ebook will help you explore your options after PhD, learn from the positive experience of other researchers, consider what is required to succeed in a competitive job market and take action so you can open doors to your future career.

[Career Development Toolkit for Higher Education Professionals](#)

Careers in Higher Education (HE) are changing rapidly as institutions adapt to a global marketplace for students, and as the political and economic landscape becomes more challenging. Traditional career structures are fast disappearing and new areas of work are emerging. Use the activities in this toolkit for inspiration as you work through each step of your career planning.

You can download more free ebooks, Toolkits and other useful resources on the [jobs.ac.uk Careers Advice section](#).

About the author

Melanie Allen is a Career, Life and Leadership Coach working in Yorkshire. She brings over 20 years of writing and developing Career Development, Leadership and Coaching training, several publications and plenty of life experience to her work.

She completed her Diploma in Advanced Executive Coaching from the Academy of Executive Coaching in 2003. Since then she has established her coaching business, working with organisational and private clients both face to face and over the phone.

Visit the website: www.melanieallen.co.uk for more information.





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