

CPD Policy

Guidance and Resources

The core principles of the CPD policy

- a. The STEP CPD requirement is applicable to all members of STEP.
- b. In their original application to join STEP and by renewing their membership each year, members agree to meet STEP's CPD requirements and record their CPD activities.
- c. Members must include 1 hour of development work relating to ethics in their development. Members can access free ethics-related CPD content through the STEP CPD Centre.
- d. Members must carry out CPD which is relevant to them in their professional role and is sufficient to enable them to meet the reasonable expectations of their clients (however many days a week they work).
- e. Each individual member should assess their own needs. For example if a member is fully retired or on long-term leave and doing no work for clients, their CPD requirement at that time is nil. If and when a member resumes client work they are expected to be up to date and competent to carry out that work. The individual member needs to plan for and manage the transfer of role.
- f. Members are required to keep a record of their professional development and to be prepared to submit this to the STEP office as requested. An archive of CPD records, going back 3 years on a rolling basis, should be kept.
- g. CPD can be recorded using STEP's forms, STEP's online record keeping facility, an employer's forms or those of another professional body. If another organisation's forms are used and do not match STEP's CPD year (1st April to 31st March) then the most up to date record covering a full year should be submitted if requested.
- h. A random sample audit of CPD records will be carried out on an annual basis. CPD records are assessed by comparing members' key responsibilities and stated CPD objectives for the year. Members are free to change their CPD plans as the year progresses, in response to changes of role, or as a result of reflecting on the effectiveness of previous CPD activities.
- i. If a member fails to submit a CPD record after letter, email and phone contacts then that member will be suspended in accordance with STEP's Code of Professional Conduct. If that member wishes to re-apply for membership they will need to supply an up to date CPD record.

Introduction

Continuing Professional Development is defined as any learning activity which helps to maintain, develop or increase knowledge, for the purposes of maintaining a high standard of professional practice. CPD can be technical or non-technical.

Carrying out and recording CPD activities is a requirement of maintaining membership (see [STEP's Code of Professional Conduct](#)).

Rationale for undertaking CPD

It is essential that all members maintain and continue to develop their knowledge and skills relevant to their role, as an obligation to clients, their employing organisation and other members, as well as a benefit to themselves.

Undertaking appropriate CPD:

- Equips members to meet the reasonable expectations of their clients
- Supports employers through a focus on continuing improvement and performance in individual members' professional work roles
- Strengthens the STEP brand on behalf of all members
- Supports the individual in achieving their career goals.

STEP's CPD policy requires members to pro-actively plan, undertake and reflect on the continued development of their work-related knowledge and skills. To make it as efficient and effective as possible, the policy is designed to be:

- Relevant to members in their professional roles
- Flexible enough to cater for individual circumstances
- Simple to manage and complete.

CPD planning and role-based CPD

STEP uses an outcomes-based approach to CPD, which focusses on whether professionals are maintaining and building competence, rather than counting the number of hours spent in training.

Well-balanced CPD plans will usually include a mix of "formal" or "structured" CPD and "informal" or "unstructured" CPD, but STEP has chosen not to specify the number of hours that members spend on each.

If your regulator requires you to record hours, or complete a certain number of hours of structured CPD, you should include that in your CPD record. Any CPD that you carry out for regulators or other professional bodies can also be recorded as meeting your STEP CPD requirements.

Members that joined before April 2014 can continue to use the 35 hour measure of CPD, until April 2017 when they will be required to use the role-based approach as a means of planning and measuring CPD.

Members that have joined the Society since April 2014 are required to use the role-based approach to CPD planning and recording.

Role-based CPD involves reviewing your current job description and the new skills or knowledge that you will need in the year ahead, then using those to plan CPD activities. This means you are using your job description to "benchmark" or measure your CPD. Members will also have the option to plan further ahead, adding skills needed for future roles to their CPD plans, as well as addressing competence for their current roles.

STEP recommends members ensure they develop in the following categories, where relevant to the individual: technical, interpersonal, management, leadership and business skills.

STEP requires members to undertake at least one hour of development activity that relates to professional ethics as part of their annual CPD. Professional Standards Awareness case studies are available free to members via the STEP CPD Centre (www.step.org/cpd).

The CPD Audit

STEP selects 5% of members at random for the annual CPD audit. Members can submit records using their own format, or use STEP's online CPD Planning and Recording tool.

The reviewers need to see the following things for a CPD record to be signed off:

- **Plan:** notes to show a member has considered their job description and identified what they should aim to achieve for the year ahead.
- **CPD Record:** planned actions that support or improve the skills needed in their role.
- **Review:** (can be part of, or attached to, a CPD record): a review of the CPD actions, stating whether they achieved the CPD aims, or prompted a member to plan further CPD actions.

CPD Resources

In addition to core technical skills, STEP has arranged access to the following business and interpersonal learning resources, identified by industry leaders as vital to achieve 'trusted advisor' status. These CPD resources are free to Members, but you will need to [log in](#) on the STEP website to access them.

CPD Planning and Recording

STEP has adopted a service called [CiZone](#), which is a CPD Planning and Recording tool. CiZone has been developed to help members identify, plan and carry out CPD activities to enhance their careers. Members can also print CPD reports or records that they can tailor to show as much or as little information as they need to for STEP, a regulator or employer.



Professional Standards Awareness

Completing a [Professional Standards Awareness](#) case study is now a requirement for completing studies and upgrading to full membership. These can also be used as CPD resources and are available to members for free.



Business Publication Archive

[EBSCO](#) has ongoing full text coverage for many journals not found in competing databases. These journals include: Academy of Management Journal, Academy of Management Review, Administrative Science Quarterly, Harvard Business Review, Journal of Finance, Journal of Marketing, Journal of Marketing Research and many others. STEP members have access to the Business Source Corporate Plus database.



Work-based Learning Library

[Alchemy Performance Assistant](#) is a practical support resource, designed to help members deal with unexpected workplace problems that can't wait for a formal training course. Experts on anything from conducting appraisals, to coming up with a business strategy have been commissioned to write summaries that help managers find possible solutions quickly. Alchemy provides support to new managers for several well-known international businesses.



More STEP CPD resources and services:

- [Conferences and branch events](#)
- [Journal archive](#)
- [Web events](#)
- [Special Interest Groups](#)

If you have any further questions about CPD, please visit www.step.org/cpd or email cpd@step.org