STEP’s CPD Policy

www.step.org/cpd
CPD requirements

• All members must carry out CPD, unless fully retired
• CPD plans can be tailored to your individual circumstances
• Original CPD Policy is being phased out by April 2017
• Members can choose to adopt the revised CPD Policy immediately
Key changes of policy

**ORIGINAL CPD POLICY**

**INPUTS**
Measured in hours
“One size fits all”

**REVISED CPD POLICY**

**OUTPUTS**
Measured by impact on self, clients, employers
Tailored to professionals’ training needs
CPD Plans

Reflect
What did you learn? What next?

Act
Which actions will you take?

Plan
What are the skills you aim to build?
All resources available to EPP contacts
Just in time learning
Career scenarios

[Image of a webpage with a section titled "Developing skills and knowledge to further my career" followed by "Planning my development – where to start" and "Making a Plan that Really Works" with brief descriptions and durations.]

[Image continues with "Goal Setting" followed by "Take charge of your career - write down how you want to develop. Employers and institutions may ask you to write a Professional Development Plan (e.g. PDP, CPD or CPE).

Planning my development – where to start
Take charge of your career - write down how you want to develop. Employers and institutions may ask you to write a Professional Development Plan (e.g. PDP, CPD or CPE).

Making a Plan that Really Works
Need to plan your development, and then act on the plan? Here’s a new three-step approach that is easier, more enjoyable, and more rewarding.

Goal Setting
Setting goals for all aspects of your work and life is an important part of career planning. Use this tool to think about - and prioritise - your goals.

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STEP
ADVISING FAMILIES ACROSS GENERATIONS
Manage My CPD Plan

On this page you can create and edit a plan for your career and professional development. Your plan can include broad AIMS (goals) and specific ACTIONS (activities, including conversations) that will help you to achieve each aim.

About aims: Your aims could be a work role you're aiming for, an experience you'd like to gain, a skill you want to develop, or any other change that you want to make to your work and life. We recommend that you select 2 or 3 aims as your highest 'priority aims' and focus on those first.

About actions: Each of your actions can be linked to more than one aim. You may edit your aims and actions or add more detail at a later date. Then select 'Reports' (from the menu above) to share your plan or your achievements with other people.

For more guidance on making a career plan, visit the help page.

Add Aim

Aims
STEP CPD Planning tool

Aim: Technical Research

For market intel and product development:

- Read Trust Quarterly Review (June 2015 edition)
  - Private study e.g. reading, **Completed**
- End of Life Conference
  - Networking / conference, **Completed**

Aim: Other work-based skills

Non-technical skills that aren't directly related to my role and weren't originally in my CPD plan
STEP CPD Planning tool

View Action

Keep up to date on EU Succession Regulation

Time Taken: 0 hours 0 minutes

Private study e.g. reading, listening, research

In Progress

Completion Date: 31/12/2016

Description / Purpose:
Monitor developments with a view to how they affect our clients.

This action is being supported by these people:
Management team

Notes:
Monitor STEP newsletters for news of any further guidance notes: http://www.step.org/guidance-notes

This action is linked to these aims (goals):
Technical Research
Reflection

**This action is linked to these aims (goals):**
Professional Standards/ Ethics CPD.

**This action is linked to these tags:**
Directly applicable to my main specialty.

**This action is accredited by:**
Coursera

**What did you learn?**
That practitioners need to engage some lateral thinking when confronted with a dilemma. "Do the least harm" seems to be the main message across all schools of thought. Applying it to real-world situations is difficult, but the course provided a checklist that you can use as a starting point.

**Next Steps:**
Look for more Professional Standards Awareness/ Ethics case studies that involve dilemmas for members.

**Impact:**
I know what sort of process of elimination is needed when confronting a dilemma that affects clients. If put on the spot I could defend my reasoning in a logical manner.
STEP CPD Report

Name: 
Reporting Period: 01/01/2016 - 31/12/2016

High Priority Aim: Technical Research
Agreed development objective: keep technical knowledge up to date, via branch events, newsletters etc.

Actions

Keep up to date on EU Succession Regulation
Monitor developments with a view to how they affect our clients.
Private study e.g. reading, listening, research - In Progress

Completion Date: 31/12/2016 00:00:00
This action is supported by: Management team
Next Steps: Further research is needed on X jurisdiction.
Any Questions?

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