THE INSTITUTE OF CONSERVATION

CPD Guide

A Guide to understanding
Continuing Professional Development (CPD)

including

Notes for completing a Continuing Professional Development (CPD) Review and Action Plan

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Understanding Continuing Professional Development (CPD)

Professional membership carries with it a responsibility to maintain professional standards by acting ethically, adhering to the profession's code of practice, and keeping up-to-date through ongoing development. Experienced professionals should also be developing broader capability and 'extended professionalism', characterised by independent judgement, involvement in a community of practice and the demonstration of practical or intellectual leadership.

If you are an **Accredited Conservator-Restorer** (ACR), you are required to demonstrate an understanding of the importance of CPD by carrying out regular reviews of your ongoing learning and development and identifying areas for further development.

As an ACR you are responsible for actively maintaining regular appraisal (review), reflection and planning of your professional development. The review process is broadly divided into two areas, **reflection** and **planning**, which are of equal importance. Icon has a responsibility to ensure that its professionally accredited (ACR) members are practising in accordance with its Code of Conduct and the Professional Standards. To achieve this Icon will request a different selection of ACRs each year to submit a Continuing Professional Development (CPD) Review as evidence. The CPD review recall is to ensure that its ACR members are keeping up-to-date and undertaking ongoing development, not to make judgements on its content. If you work part-time or are retired from full-time work and you wish to retain your ACR status you will still need to undertake regular reviews; it is acknowledged that your reviews may be more focused on specific areas of interest and may perhaps be less extensive than those undertaken by conservators working full-time.

Completing a full review and/or action plan of your professional development is a mandatory requirement for **members applying for reinstatement to Accredited membership status after a period of Time Out**. (Please see the separate *Time Out Policy* available on the Icon website.)

Candidates applying for accreditation will need to provide a review of continuing development over the last two years, as well as evidence of identifying areas for future development and planning how to take these forward. Details are included in the Icon Accreditation application form.

Throughout your career, **whatever the level of your Icon membership**, your professional development requirements are likely to alter, depending on your range of practice, particular projects or responsibilities, and career direction. Undertaking CPD will help you at any stage of your career.

You may find it helpful to look at the Training section of the Icon website.

CPD Principles

CPD embraces all types of learning relevant to your professional life. The process aims to promote learning rather than add unnecessary bureaucracy, and not restrict the type of activities that 'count', provided they lead to useful learning. It includes learning from informal and unplanned activities as well as from courses, reading, meetings, new projects, etc. Although it is expected that you provide evidence of keeping up-to-date in your field, your professional development should not just focus on core conservation activities. Wider aspects of culture and heritage, management, business development, teaching and training, and so on could be included, depending on your current work and future aspirations. Supporting the profession, through the promotion of conservation, training others, and participation in your professional body are also aspects of 'extended professionalism' which can be considered in your review.

You may find it useful to consider three kinds of learning (after Gear et al., 1994):
Specific learning concerns particular cases or problems, typically 'finding out as you go along': reading up regarding specific objects or problems, asking colleagues about treatments, checking sources of supply, and so on. This kind of learning is important for day-to-day practice but often becomes out of date quickly. It should not normally be included in your CPD review, unless it has a longer-term impact on your work or leads to findings which are of more general interest.

General learning concerns keeping up-to-date and abreast of trends and developments in the profession and affecting it. This kind of learning might involve reading journals and email discussions, networking and discussion with colleagues, and attending courses and conferences. Your CPD review should show that you are keeping up-to-date in your field, without needing to cite every example in detail.

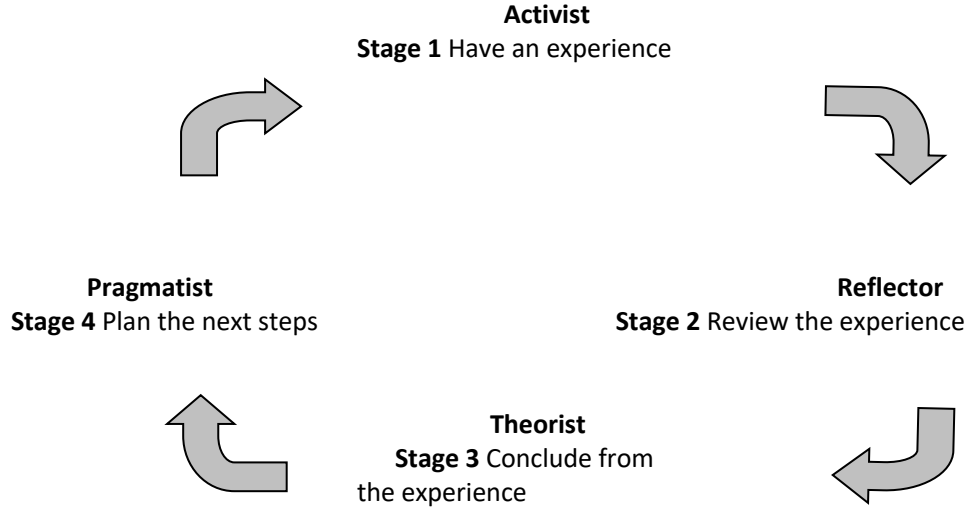
Developmental learning is learning which takes forward your practice, creates new opportunities and develops extended professionalism. It may involve undertaking a major study, advanced course or programme of research, be generated through a new job or major project, or stem from becoming involved in activities outside your normal work. Although it is useful to plan developmental activities, the value of developmental learning is often only apparent on reflection.

Understanding how you learn

Learning is a continuous process. Many opportunities for learning occur during structured learning events, training courses and the like, but perhaps the majority arise from informal opportunities or may be facilitated by new experiences or activities. CPD recognises that all these experiences are valuable, as long as one takes time to reflect, review and learn from them.

The learning cycle model, developed by David Kolb, identifies four stages in learning, where each stage in the cycle adopts a different approach to the way you learn. Peter Honey and Alan Mumford connected each stage in this learning cycle with a preferred learning style.

Kolb's Learning Cycle



Learning stages	Learning styles	
Having an experience	Activist	Learns best from activities where they can throw themselves into a task
Reflect on the experience	Reflector	Learns best when they can review what has happened
Conclude from the experience	Theorist	Learns best when they can understand what they have learned as part of a wider picture
Plan the next steps	Pragmatist	Learns best when an opportunity presents itself to learn on the job

It is useful to understand how you learn best so that you plan your learning activities accordingly (personal development), yet consider learning opportunities that are not necessarily in your 'comfort zone' to expand your ability to become a more balanced learner. For example, if you learn best by observing others (reflector) and this is not possible—why not consider taking part in a new project at work instead (pragmatist) or carry out some independent research (theorist) to achieve the same goal / need.

The Professional Standards

The following pages contain the Institute of Conservation professional standards for conservation-restoration.

Summary of the professional standards and professional judgement and ethics

Professional standards	Professional judgement and ethics (J&E)
1. Assessment of cultural heritage assessing and reporting on condition, environment and threats, assessing risks, identifying any problems to be solved. **2. Conservation options and strategies** identifying and evaluating options; negotiating courses of action for conservation measures. **3. Conservation measures** advising on, developing policy for and implementing conservation measures; ensuring high standards are maintained; planning to minimise the effects of disasters and emergencies; maintaining conservation records; advising on aftercare. **4. Organisation and management** managing projects and workflow; client/internal and external relations; health and safety; security; records and reports; communication. **5. Professional development** maintaining up-to-date practice; extending and communicating knowledge; promoting conservation and the care of cultural heritage.	i. understanding principles and practice ii. conversance with guidelines iii. understanding the wider contexts of conservation iv. critical thinking, analysis and synthesis v. openness to alternative methods and approaches vi. understanding the ethical basis of the profession vii. observing code of ethics and practice viii. observing legal requirements ix. responsibility for the care of cultural heritage x. responsible and ethical dealings with others xi. respect for the cultural, historic and spiritual context of objects xii. handling value-conflicts and ethical dilemmas xiii. understanding and acting within the limits of own knowledge and competence

Standard 1: Assessment of cultural heritage

Standard 1 (points a–e below) requires you to demonstrate the ability to assess cultural heritage that presents complex conservation problems. Your work context will dictate the method of assessment and type of cultural heritage you can choose, for instance your work might involve examining objects brought to a studio for treatment or advice, or it might call for you to provide the detailed assessment of a collection or structure, or a strategic assessment of a series of collections or defined area of cultural heritage.

Depending on the situation, you may be able to demonstrate more than one level of assessment for example, an initial, visual assessment followed by more detailed investigation and analysis or by ongoing monitoring and audit.

You must show that you:

1a) Understand the significance and context of the heritage to be assessed, along with any implications for potential conservation measures.
Consider, for example, how the heritage is used or displayed; the design and environmental context of the heritage; any personal, cultural, historic, spiritual, symbolic or financial significance; ownership of and responsibility for the heritage. You may need to undertake both visual/material and historic/archival research.

1b) Can assess the physical nature and condition of the heritage.
The methods used for assessment must not threaten the condition or integrity of the heritage to any significant extent. You must refer to other competent sources where analysis lies outside of your area of personal competence or requires specialist resources. You must demonstrate a good understanding of the material properties and typical degradation patterns of heritage in the area that you work.

1c) Can assess the impact of the environment and potential changes on the heritage.
This needs to be applied as appropriate to the context of your work, for example it may involve asking the owner of an object about its current and proposed environment and use, it could involve carrying out a detailed assessment of a collection or site, or assessing the impact of development proposals or other potential changes on a site or structure. You must refer to other competent sources where analysis lies outside of your area of personal competence or requires specialist resources.

1d) Can assess the implications of taking no further action.
This will include implications for the heritage under consideration and, as relevant to the situation, any risks to other objects or structures, the environment or surroundings, and to health and safety.

1e) Can record or report the findings of the assessment.
Depending on the context, findings may involve a combination of verbal, written, software-based and graphic representations. The coverage and detail of the report or records need to be appropriate to the context of the assessment

Standard 2: Conservation options and strategies

Standard 2 (points a–c below) requires that you demonstrate the ability to evaluate options and negotiate actions in contexts that present complex conservation problems. The standard should be applied according to your work context, for instance it could apply to decisions discussed with a client about objects brought to a studio for treatment or advice, a strategy for the management of a collection or building, or a response to a specific threat or conservation issue.

You must show that you can:

2a) Identify and evaluate conservation options.
Options could include managing the use, display etc. of the heritage differently; physical conservation treatments and measures; preventive or protective measures; and maintaining the status quo. Options should be based on adequate assessment and research. You should be able to identify options that require novel or adapted measures, and know how you would develop and implement or commission these. Evaluation will include identifying the risks, resources and benefits associated with the different options, as well as their implications for future use, display etc.

2b) Develop advice, recommendations or policies relating to the different options available.
This will include considering the resource implications of the various options, any implications for project management or development, and where relevant identifying sources of resourcing or funding. You should be able to advise on any legislation, official guidance or organisational policy that affects your area of conservation. Your advice or decisions will need to communicate and promote good conservation practice.

2c) Develop or negotiate a considered course of action for implementation.
You should be able to negotiate with organisations and individuals as relevant to your area of practice. The agreed action should be recorded in a format and level of detail appropriate to the context.

Standard 3: Conservation measures

Standard 3 (points a–f below) requires that whatever your role, you are knowledgeable and proficient in all aspects of conservation. Meeting the conservation measures as outlined in points a–f will show that you can work effectively with situations and aspects of heritage that present complex conservation problems, and that you can deal effectively with any unanticipated problems or findings.

If you are involved in practical conservation treatments, you can use work on cultural objects as evidence. If you are involved in generic collections care or you are a manager of conservation across a broad spectrum, or a teacher and trainer in conservation you will need to show that you have an in-depth knowledge of conservation and can apply it to produce professional results. Your evidence needs to show that you produce accomplished results in the type of work that you do.

If you mainly undertake conservation treatments, you must have a sufficient knowledge of preventive conservation to advise on the ongoing care of the heritage on which you work.

If you are mainly involved in preventive conservation, your knowledge of treatments must be sufficient to know what kind of treatments are available and when they are appropriate.

If you are primarily a manager, teacher, or trainer you must have an in-depth knowledge of conservation and be able to exercise relevant professional judgement independent of the advice of others (it is not sufficient to be an effective manager, teacher or trainer: you must show that you are a knowledgeable conservation professional).

The assessors will be looking to ensure that what they are shown accords with the specialism(s) and role stated by you on the application form. They will be assessing your proficiency (see p5 novice-to-expert range) against the professional standards and not your qualities as a teacher, manager, head of practice etc., (though of course you must also meet the requirements of Standards 4 and 5).

When completing the application form the evidence you provide for assessment demonstrating Standard 3 will depend on your specialism(s):

you would put forward physical evidence of conservation-restoration treatments, demonstrating your skills and knowledge as a treatment-based conservator to at least proficient level on the novice-to-expert range, and demonstrating a working knowledge of preventive conservation,

or

you would put forward physical evidence of preventive conservation, demonstrating your skills and knowledge as a preventive conservator to at least proficient level on the novice-to-expert range and demonstrating a working knowledge of conservation-restoration treatments,

or

you would put forward physical evidence of conservation management / teaching, demonstrating your skills and knowledge as a conservation manager or tutor to at least proficient level on the novice-to-expert range and demonstrating a working knowledge of relevant conservation treatments and preventive conservation.

You may also choose to demonstrate the professional standards including J&E using a combination of all the above, in which case your evidence will have to reflect a proficient level in all the work you put forward.

You must show that you can:

3a) Communicate appropriate practice in the care, protection and treatment of cultural heritage.
Communication may be in the form of advice, policies, strategies, recommendations etc. You will need to take into account any relevant national, local or organisational frameworks and policies. Care, protection and treatment may relate to ongoing or exceptional situations, anticipating or responding to disasters or emergencies, or responding to external proposals and changes. You should be able to communicate knowledgably the conservation implications of any policy or plan for the heritage in your area of work. You should be able to advise on requirements for the ongoing protection of heritage that has left your care.

3b) Implement treatment-based, preventive or conservation management measures.
This includes being able to advise on the physical and chemical characteristics of materials and causes of decay, the measures and techniques to be used, and the use of relevant resources, skills and equipment. Measures may be for instance physical, chemical, environmental or statutory, or relate to managing or influencing the interaction of others with the heritage. You should be able to advise on new and developing techniques and their practical implications. The methods and techniques used should take into account relevant contextual and ethical factors as well as current research and guidance in the field concerned. You will need to understand the perspectives and roles of others who have an impact on the protection and care of the heritage, where necessary working with them to ensure that measures are effective.

3c) Ensure that measures meet recognised conservation standards.
This includes meeting any standards or codes of practice required by the relevant conservation body or specialist section. You will need to ensure that measures are implemented with a sufficiently high level of skill, judgement and ethical consideration regardless of whether you are carrying them out yourself, delegating or commissioning, or managing more broadly.

3d) Identify and evaluate conservation options.
This includes deciding on appropriate methodologies for gathering, interpreting and presenting data. It includes adjusting or renegotiating measures should findings suggest this is necessary.

3e) Maintain records of conservation measures.
Records should be of a form, level of detail and clarity appropriate to their intended use, and be sufficiently permanent.

3f) Recommend appropriate sources of further analysis, treatment or preventive care where these lie outside your remit or area of expertise.
This could relate, for instance, to remedial treatment, scientific analysis or specialist monitoring, or specialist preventive, preservation or legislative expertise.

Standard 4: Organisation and management

Standard 4 (points a–g below) should be applied according to you and your work not the context in which you are working. Where you are not fully responsible for a studio, workshop, practice etc., you will not be marked down for practices over which you have no control, provided that: you understand where there are problems or inadequacies, your own work represents good practice, and that you are not an accessory to unethical or illegal practice.

Standard 4 reflects a level of management that all conservation professionals should be able to meet, it is not specifically about being a manager. You can provide an overview that shows that you meet the relevant professional standards or act to promote them (e.g. you may not have objects in your care, but what do you do that promotes the care of objects by others?). This part of your evidence can also be a good opportunity to demonstrate much of the Judgement and ethics section.

4a) Organise and manage work to ensure that it is completed appropriately.
This applies to your own work, as well as to any work that you lead or delegate. It includes agreeing and meeting timescales, resourcing requirements and where appropriate budgets, keeping stakeholders informed of progress and renegotiating where necessary. You could refer to project scheduling, the work-plan for a department or for a major development, timetabling and lesson-planning for a course, or how you manage consultancy or contract work (from the client or contractor/consultant perspective).

4b) Ensure that your work practices and any you promote comply with applicable legal and contractual requirements.

4c) Ensure that your work practices and the area for which you are responsible comply with relevant Health & Safety regulations and guidelines, minimising risk to yourself and others.
This includes the ability to carry out and act on risk assessments.

4d) Take responsibility for the care of cultural heritage within your influence.
This may include, for instance, ensuring the safety, security and correct storage of objects, and taking relevant measures to prevent damage during a project or preceding investigation.

4e) Adhere to good business or internal practice in dealing with clients, colleagues and other stakeholders.
This includes maintaining good working relationships and effective and open communication. Stakeholders can include internal clients (e.g. curators, archivists, architects, elected members etc.) and contractors, as appropriate. You could show that your advice, policies or instructions meet the relevant requirements.

4f) Ensure that adequate and accessible records are maintained.
Records include conservation records, statutory records, records required by your organisation or needed for running your business, and any records that you or your colleagues need to work effectively. Recording should use relevant methods and formats including, where relevant, the use of appropriate technology and software. Records must be physically accessible and intelligible to the people who need access to them. Records must be maintained for an adequate period for their purpose. Appropriate levels of security and confidentiality should be maintained.

4g) Communicate recommendations and advice effectively.

Standard 5: Continuing Professional Development

Standard 5 (points a–e below) requires you to demonstrate through continuing professional development (CPD) active maintenance and improvement of your professional knowledge. This standard will be regularly reviewed after you have been awarded accreditation and is considered to be an essential element in demonstrating commitment as an accredited conservator. The CPD review and plan will form the basis for the mandatory CPD review recall which you will be asked to complete two years after the date on which you became an accredited conservator. Further recalls during your career will be made approximately every five years.

You must show that you:

5a) Keep yourself informed on changes in the profession as well as broader developments relevant to your work context.

5b) Ensure that your practice, knowledge, skills and techniques are up-to-date, both at a general level and in relation to individual projects and tasks that you undertake.
This includes maintaining familiarity and where appropriate contact with relevant bodies in the conservation field and beyond as relevant to your area of practice. Updating needs to be appropriate to role, e.g. if you carry out treatments you would be expected to understand and be able to use new techniques in your field; if you are a manager or advisor you would be expected to understand what is available and where they are appropriate, but not to be able to carry them out.

5c) Demonstrate the ability to reflect on and learn from your practice.

5d) Continue to acquire knowledge in your specialism(s) and area of work, and disseminate it through informal or formal means.
The specialism(s) and area of work could be a conservation specialism, or a particular area of practice, knowledge or research in, or related to, conservation.

5e) Promote conservation and the care of cultural heritage to lay and expert audiences, including other professionals involved in cultural heritage or the built environment.
This includes being able to provide training or instruction to others where necessary.

Professional Judgement & Ethics

Professional judgement and ethics (J&E) (points i–xiii below) are a core component of the professional standards. Your understanding and application of J&E in relation to professional standards 1 to 5 should be evident across your work.

You can demonstrate your professionalism by showing convincing evidence of the application of professional judgement and ethical standards based on your acquisition of a substantial foundation of knowledge and understanding of conservation principles through your training or professional experience. Knowing when and how to seek relevant information is an important aspect of showing professional judgement. You should be able to handle a wide range of situations professionally, and apply ethical principles in practice. It is not sufficient to demonstrate knowledge of your professional organisation's code of ethics or practice.

You must:

i. Understand the principles of conservation and demonstrate an in-depth understanding of the specific area(s) of your practice.
ii. Be conversant with national and international principles, philosophies and guidelines relevant to your practice.
iii. Understand the wider contexts in which conservation is carried out, the implications of context for practice, and the implications of treatments and methods within the context.
iv. Use an adequate level of critical thinking, analysis and synthesis in approaching conservation problems and developing appropriate solutions.
v. Appreciate and be prepared to consider alternative, valid methods and approaches that are relevant to your practice.
vi. Understand the ethical basis of the profession and the responsibilities of the conservation professional to cultural heritage and to wider society.
vii. Understand and observe your professional body's code of ethics and practice.
viii. Observe legal requirements and obligations, including those relating to health and safety, employment and contract law, and international agreements.
ix. Take responsibility for the care of cultural heritage within your influence.
x. Act responsibly and ethically in dealings with the public, employers, clients and colleagues.
xi. Act with awareness of and respect for the cultural, historic and spiritual context of objects and structures.
xii. Be able to handle value-conflicts and ethical dilemmas in a manner which maintains the interests of cultural heritage.
xiii. Understand the limits of your own understanding and abilities, and practise within them.

Guidance Notes for Completing a CPD Review

A mandatory CPD process applies to all accredited conservator-restorer members (ACRs) of Icon (please see *Icon CPD Policy* available on the Icon website). It can be very rewarding to complete reviews of your professional learning and development on a regular basis regardless of your Icon membership status.

To maintain the high standard of Icon Accreditation and to ensure that its professionally accredited (ACR) members are practising in accordance with its Code of Conduct and the Professional Standards, Icon will request a different selection of ACRs each year to submit a Continuing Professional Development (CPD) Review and Action Plan. In order to do this those ACRs selected to submit a CPD review will be asked to complete the *CPD Review and Action Plan Form*.

No matter how long you have been in professional practice you will have a responsibility to keep up-to-date and to learn something from every project or activity you undertake. In the professional community this learning is seen as 'Continuing Professional Development (CPD)'. Recording CPD is a systematic approach to professional learning. It recognises that everyone has different learning needs. To address those needs you must plan ahead. The principle of CPD is that it should be an ongoing or a career-long process. In brief, CPD is the process whereby you undertake **self-appraisal** to identify what areas in your learning you want to develop; **plan** what you need to do and how you will make this learning happen; and then after the learning event **reflect** on the experience; this in turn will help you identify and **plan** for the next steps or new learning opportunities. By this continuous cycle of self-appraisal, action and reflection your professional development is continually improved.

Professional development may take different forms, it is likely that you will experience some form of learning from most tasks you undertake. Day-to-day work, which may seem routine, might on reflection have offered unexpected learning opportunities, other projects or activities may provide broader or new learning opportunities. By taking some time both to appraise learning needs before a project gets underway and to reflect on the learning experience once a project is completed and recording your experiences you will be enhancing your personal professional development. You may also find that something learned from one project leads to further learning opportunities.

Every time you review your learning you should record the learning goal you were hoping to achieve, how you went about fulfilling your goal and within what time frame. Recording CPD is not just retrospective however, it can help with planning; so part of a learning review should also include an action plan. A written action plan can complement a work schedule by helping you to prioritise your learning within your everyday work. As the name suggests, it enables you to plan over a specific period of time when you expect to begin or complete your CPD goals.

A learning log is a useful tool in maintaining your CPD, it can help you record and reflect on steps you have taken for your professional development. By using a CPD log you record your learning achievements and plan and reflect on how you achieved them. The *CPD Review and Action Plan Form* is a continuation of the Icon CPD log available to all Icon members. There is more information about professional development opportunities in the Training section of the Icon website.

Using a learning log to assist with your CPD

What is a learning log?

A learning log is an informal tool to assist you with recording any specific learning that takes place relevant to your professional development. It also can help you reflect on your learning.

For example, following a project / activity you could write a brief summary of how you think it worked out. You could ask yourself a series of short questions:

- Did it work to out as I expected?
- What was the most successful part of the project / activity?
- Would I consider using a similar approach in the future?
- Would I do things differently next time?
- What would I do the same?
- What would I do differently?

Answers to these questions could provide you with an indication of how much you have learned from one particular project / activity. It is these learning outcomes that are worth noting—and using for future planning and development.

You may find that a project worked well in one particular area and the experience gained could be useful in informing future professional projects / activities. It may also be something that would benefit others and you could consider sharing your learning with others. Likewise you may have realised during the project that you would have benefited from some training to expand your skills / knowledge in a particular area. Whatever the outcome it is useful to jot down this information in note form—for private reference, while it is still fresh in your mind. It can assist you in a number of ways:

- Tailoring your CV and letters of application for a specific post or career move.
- Staff appraisals.
- Identifying any training needs.
- Writing your annual CPD review.

A learning log sheet does not need to be in a particular format. The form it takes is up to you. You may find that a small notebook used like a diary will help you to record your learning, or a loose-leaf folder or file on your computer. It is a personal working record of your development for your own purposes, no one else's.

The following example of blank CPD log sheet, followed by a worked example asks you to note the following:

- dates of project / activity*
- short description of project / activity*
- key learning outcomes
- how you applied, are applying or will apply what you learnt
- any action points / further information or development requirements.

* This may include work projects, training events, research, and external activities e.g. developing skills / knowledge outside the workplace that can be used in your professional development—such as being a voluntary committee member for a local club.

Blank example of a Personal learning log sheet

MY CPD LEARNING LOG	
Professional Development Activity	
Dates of professional development activity	
Short description of project / activity What did I do and why?	
What skills / knowledge gaps did I identify?	
What did I do to fill the gaps?	
When did I fill the gaps (dates)	
What did I learn from it?	
How can I apply the learning?	
Any further actions required? [draft an action plan]	

Worked example: Personal CPD leaning log sheet

MY CPD LEARNING LOG	
Professional Development Activity 1	
Dates of professional development activity	5-12 Jan 2018
Short description of project	Museum survey archive contract
What skills / knowledge gaps did I identify?	Needed to learn how to use new digital camera and more advanced image manipulation software for digital reports and annotated images
What did I do to fill the gaps?	Half a day practicing with camera. Online tutorial.
When did I fill the gaps (dates)	10-12 January 2018
What did I learn from it?	Functions and applications of camera. (macro and when to use manual settings). Labelling images. Didn't like online tutorial for more complex understanding. Need face-to-face teaching.
How can I apply the learning?	More professional and clearer documents for clients. More personal confidence. Pass on knowledge to assistant.
Any further actions required? [draft an action plan]	Look for relevant IT course at local college [summer course or evening course in Sept]

Submitting a CPD Review

If you have been selected to submit a CPD review this year you will have received a request by email. When recalled to submit your *CPD review and action plan* please use the form provided with the request.

Please:

- Make a note of the deadline and send the completed form by the date specified.
- Send only the completed *CPD Review and Action Plan Form* - do not send any supplementary documentation as this will not be forwarded to the CPD readers.
- **Do not** rely on weblinks to illustrate elements of your CPD, these will be treated as supplementary documentation and the CPD readers will not look at them.
- To remain impartial and to avoid any conflicts of interest the two CPD readers who will look at your review will not have the same specialism as you nor will they know you personally or professionally. Please, therefore do not use jargon or acronyms specific to your specialist area that someone who does not work in your field is unlikely to recognize. Please only use an acronym after you have written it in full first, e.g. 'The Institute of Conservation (ICON)'.

Time Out
It is possible to take periods of 'professional leave,' for instance if you intend not to practice for a period of a year or more, or you have been ill, or are taking a career break. In these cases you can suspend your reviews for a period subject to agreement with Icon. Please refer to the 'Time Out' policy document available from the Accredited Members section on the Icon website.

Reflection (recording): (sections 1 & 2 of the CPD review and action plan form)
The aim of reflection is to consider and identify **what**:

- you needed to learn, (your aim)
- you decided to do to fill the gap, (your objective)
- timescale you gave yourself to achieve your objective,
- you actually learnt and whether it fulfilled your objectives,
- impact your learning had personally and professionally,
- you might do with this learning beyond your own practice, and
- your next steps might be.

For general learning you may find it useful to reflect briefly on particular learning events, topics or episodes, while for learning that extends your practice it can be more appropriate to reflect more broadly without being constrained by particular events or activities. In some cases it can be informative to look back over a longer period than a year to reflect on your longer-term development, particularly if you are contemplating a significant change in the future. Keeping a CPD learning log is a useful exercise to help with this kind of reflection.

Self-appraisal (reflection) can help you to consider:

- How your knowledge and understanding has changed.
- What you can do that is different.
- If appropriate, whether your perspective or approach has changed in any way.
- How you can enhance your professional activities or support the profession.

Planning your learning (section 3 of the CPD Review and Action Plan Form)

In order to have systematic and ordered learning it is necessary to plan. Therefore section 3 of the CPD Review and Action Plan Form asks you to note the learning goals you hope to address in the immediate and longer-term future. Some of these goals may be in response to your learning from prior professional learning activities and some may be in response to other personal or professional influences. Whatever the motivation some of the goals set in the action plan for the CPD review submission should follow on from section 2.

Section 1 Work Context

Briefly describe the context of your practice. What do you personally do within the main areas of your own work and your responsibilities?

This is not the same as repeating your job description. As well as briefly explaining what you do at work you can also include any voluntary roles, or activities you undertake outside of the workplace that contribute to your professional learning. Please avoid using abbreviations without introducing the full name of an organisation or activity at least once.

This section helps the CPD readers to understand how the situation in which you work together with your personal responsibilities within it may influence the type of professional learning you will be undertaking.

Remember CPD readers will not have the same specialism as you and so will not necessarily be familiar with terminology from your specialist area; please avoid using abbreviations and specialist technical terms without explanation.

Section 2 Self-Appraisal (Plan : Act : Reflect)

Section 2 comprises a number of individual tables. Each table represents one professional development activity. For the purpose of submitting a CPD review you are asked to complete a table to describe each learning goal you set yourself; and to reflect on the learning experience (up to a maximum of 8 activities). You can include in the 'Aim' section of the table why you planned this particular learning goal.

The selection of projects chosen as examples for this section can also include projects / activities outside your work. Make sure that your particular role in relation to both work and non-work projects is clear. This section is likely to include activities that you identified in your last action plan. Please remember that if you are undertaking regular review of your professional development 'your last action plan' should not mean the last action plan you submitted for an Icon CPD Review Recall. Please do not contact Icon requesting to see the last review you submitted, as you should be keeping your own records of your CPD and the action plan will most likely be out of date.

Consider these aspects:

- What did you do?
- Where did you do it?
- When did you do it?
- Who was involved?
- How did you achieve it?

Remember the CPD readers will not know what you planned to do over the past 12 months to 2 years. Your review should reflect on the last two years of practice, or longer if you find that it is relevant to your current position. If you were newly accredited two years' ago your review should follow on from the CPD section in your PACR application form.

If your professional circumstances have changed since the last action plan, then this is the place to record them (see notes from readers meeting).

Professional Development Activity 1	
Title of Activity	*Include a brief description of the scope and/or specific aspect of that activity that provided the learning opportunity.*
Self-appraisal (aim)	
What skills / knowledge gaps you identified	*Be specific about what you intended or needed to learn.*
Plan (objective)	
What you did / have planned to do to fill the gaps	*Briefly describe what you did to fill the gap; how you undertook to learn.*
Act	
Date by which you planned to / did fill the gaps	*List the target date(s) you set yourself and the date(s) you completed your learning goal. These may be 'month and year' or more specific if for example you attended a training event*
Reflect	
Did you achieve your objectives?	*You could use your personal CPD log here to consider and comment on the outcomes from recent projects / activities. Did they go as planned? What worked well or what would you have done differently?* *Expand on why not if you did not meet your objectives this time.*
What did you learn?	*Be specific. You may have 'learned a lot' but for reflection to be useful to you and for the purposes of meeting ACR requirements for a CPD review submission you need to expand on this and specify what exactly it is that you have learned. Even if you did not achieve what you hoped you will almost certainly have taken away some learning about why you were unable to meet this particular goal. You can also include learning from unforeseen opportunities, examples could include dealing with a practical conservation problem or writing an article for a newsletter. How has your knowledge and understanding changed? What can you do now that is different? Has your perspective or approach changed? Consider the knowledge and practical / professional skills you have acquired (refer to PACR professional standards 1–3 as a guide). Consider learning acquired from organisation and management activities, including self-management (refer to PACR standard 4 plus the professional judgement and ethics as a guide).*
How has it impacted on your work / career / you personally?	*Consider the changes, which may, or may already, have occurred as a result of what you have learnt.*

How have you used this learning within and beyond the profession?	*Have you used this learning to benefit your own professional activities, other people and/or the profession in general? For example, if you have developed a professional skill, you could be recognised as a specialist in your field for others to consult, or you may be able to work more effectively, or it may have helped you to identify a further development need.*
Will you use this learning within and beyond the profession?	*How would you communicate this new learning to others? Even if you have not been able or not had the opportunity to put your new knowledge / skill into practice the fact that you have undertaken new learning and can identify where you might use it in the future demonstrates an understanding of CPD.*
Did you need to identify and plan another CPD record from this activity? Have you noted it in your future action plan?	*This learning activity may be an end in itself. But if it has triggered another learning opportunity keep the momentum of your learning going by noting any future development goals. Motivate yourself by adding it, together with target dates, to your action plan*

Section *3* Future Learning Activities (Action Plan)
The aim of planning is to identify areas where you know or anticipate you will need to develop your knowledge, understanding or skills or gain different perspectives, (**your personal** goals) and to identify how you will go about this. As well as immediate requirements which can be met in the following year (general learning), you may also want to plan longer-term for career development or to anticipate more distant changes (developmental learning). Where possible, you should show a connection between your action plan and your earlier comments on the form.

Remember that you are planning for your own personal and professional development (not tasks that you need to undertake). Although some learning will benefit your business or employer a CPD review is for you to reflect on what this learning means for **you personally** and how your plans meet **your own** development. Be careful not to confuse task-based goals with personal goals.

Make your goals as personal as possible. It is tempting to use task-related goals, as you would in forward planning your workload for an employer or in your private practice, but this is the opportunity to focus on your own needs. Concentrate on skills and learning you want to enhance.

Below are two examples of an identified goal / need in an action plan to show the difference between a personal goal (✓) and a task-based goal (✗). The CPD Review and Action Plan Form allows you to plan for identified personal goals / needs and to provide specific dates by which you look to achieve them.

The difference between a personal goal and a task-based goal is illustrated below.

personal goal (✓)

Identified goal / need	Specific development activities	Target dates
Develop my skills in the use of digital photography for recording conservation work	Read relevant literature—to find out the basics and consider options available.	January [year]
	Consult colleagues on ConsDist List—to assess costs and benefits / archiving the images.	February [year]
	Attend practical workshop for beginners—to gain hands on experience.	24–25 June 19
	Use the XX collection digital photography project to practice new skills.	December [year]

task-based goal (×)

Identified goal / need	Specific development activities	Target dates
Complete XX collection digital photography project	Establish preliminary work required in advance of photography.	February
	Participate in project planning meetings.	Ongoing
	Complete project.	January

Your plan should indicate:

- What you want to develop or learn.
- The method(s) you anticipate using.
- How you intend to use it, and
- A realistic target date for completion and review.

The plan is useful in setting targets which may otherwise slip or lose out to more urgent needs, but it is recognised that you may want to modify it as circumstances change and make use of unplanned learning opportunities as they occur.

Consider using the SMART objectives to note your personal goals / needs
S—specific
M—measurable
A—achievable / agreed
R—realistic
T—timely / time bound.

Do you need to develop a skill or do you have any personal aims? Who could help you? What do you do best and could you develop this more? Do you feel that you have a knowledge gap such as H&S regulations / IT and if so, how can you improve this? Do you have an ambition or desire to achieve a certain goal over the next 12 months, or do you have any long-term goals, e.g. a senior position, or to start up a new business? How would you plan to do this? What would you need to do? Do you know of any barriers that may stop you from achieving your goals / personal needs? Consider the options available to you.

Goals are personal aims, e.g. setting up a new business / changing job.
Needs are satisfying any personal knowledge / skill gaps.

How can you meet your personal goals / needs?
When will you make it happen? What will be your timescale?
Using the goals / needs you have identified in section 2 list on the table specific ways in which you could achieve these goals / needs, and provide specific dates. You can add rows to the table if required. Consider a range of activities such as reading relevant literature, working alongside another professional or attending a training event. Please bear in mind that you may learn more successfully from one type of activity than another, depending on your preferred learning style. Please refer to the section on Learning (pages 3–4).

You can put your goals / needs in order of importance and identify target dates that you feel are realistic but sufficiently challenging, to make sure you try to achieve them.

Future Professional Development Activity 1		
Title of Activity/Goal	*Insert a general description of what you want to learn*	Date identified
Goal (aim)		
What skills / knowledge gaps you have identified	*Insert what you hope to achieve. Consider your current roles and personal priorities for the next 12 months to 2 years and think about what you personally want to achieve over that period of time. You could refer to your previous action plan to reflect on your personal development*	
Action (objectives)		
What you plan to do to fill the gaps	*Insert brief outline of what you intend to do to achieve your goal*	
Target dates		
Date by which you plan to fill the gaps	*Be as specific as you can by inserting dates by or time-frame in which you hope to achieve your goa]*	

Following, there is an example of one completed professional development activity and future professional activity (action plan) from the CPD Review and Action Plan Form.

Professional Development Activity 1			
Title of Activity	Condition survey with digital photography museum archive boxes 1-75 to begin June 2018		Date identified 05 Jan 2018
Self-appraisal (aim)			
What skills / knowledge gaps you identified	I identified that I had a basic understanding of using my new digital camera but was not confident that I was using it to its full potential. I also wanted to be able to create the best photos for use with image editing software. The curator of the museum wanted some annotated images and although I knew I could work out how to produce the images required I realised it would be more effective use of my time and give me confidence to be taught how to understand advanced functions on my camera and more advanced use of digital editing software. I had a fair knowledge of Adobe®Photoshop having in the past used online tutorials and trial and error. However I realised that it would be more effective and I would benefit from a class environment rather than trying to 'teach myself' and therefore identified that it was time to invest in a tutor-guided courses for both using my digital camera and if possible find a short intermediate course for Adobe®Photoshop.		
Plan (objective)			
What you did /have planned to do to fill the gaps	Initially I planned to practice with my new camera after looking at more online tutorials. However, as well as this I felt I would benefit from some one-to-one instruction and meeting other people interested in photography and digital editing and so planned to research whether the local college that I knew to run short IT courses had anything suitable during the Easter term. Although not at the beginning of the academic year I planned to identify relevant courses for both digital photography and Adobe®Photoshop. I also planned to enrol in a relevant course if possible between February and end of May and work out how I will pay for it.		
Act			
Date by which you planned to fill the gaps	**Target date**	**Completed**	
	10 January 2018 08 January 2018 End of Jan 2018	12 January 2018 09 January and 12 March 2018 No course available until Sept 2018	
Reflect			
Did you achieve your objectives?	Yes. Although there was no place on the digital editing course I wanted I identified want I would like to do and plan to add it to my next action plan (academic year 2018/2019)		
What did you learn?	The online tutorial was sufficient to consolidate the basic knowledge of the camera and practising with the camera was beneficial for me to understand when I should use manual settings and when I can trust the auto setting. I have also learnt how to use the macro function which has proved really useful for detail shots. I have learnt how to label images which I was having difficulty with and which will help with the survey project. However, the intermediate/advanced online tutorials for image editing software were not helpful and I reinforced that I need to attend a formal course. The courses at the local college I would have liked to attend were all full until September 2018. However, I identified two suitable courses which the college was repeating the next academic year and I made a note to plan to apply. In general terms I also learnt that researching local training providers was not as straight forward as I anticipated and in future I will allow more time. An unintended learning opportunity arose for me to challenge one of my least favourite skills which is budgeting and to investigate and apply for possible grants for helping me to fund a course. [Professional Development Activity 2]		
How has it impacted on your work / career / you personally?	I feel more confident that I can produce more professional looking reports for clients. A visit to the college helped show that I will not be out of my depth or too old to attend as there is a spread of ages from different sectors already enrolled. I am even looking forward to expanding my knowledge and advancing my skills in this area come September. I will need to budget for the course in case I do not receive a grant and I will include the cost in my annual budget for the next financial year. It has unexpectedly provided an opportunity for me to learn how to write an application for grant funding.		

How have you used this learning within and beyond the profession?	I have already been able to teach my assistant how to make better use of the camera's capabilities and how to use the additional labelling skills and they have also expressed an interest in looking at local IT courses too. It has shown my assistant the importance of keeping up to date with changes in technology and how to present well.
Will you use this learning within and beyond the profession?	I have passed on my knowledge to my conservation assistant and it will probably be helpful to my fellow committee members at the local sports club I am a volunteer for (presentations and producing marketing material).
Do you need to identify and plan another CPD record from this activity? If so have you noted it your future action plan?	Yes, I need to plan enrolling and financing the IT course beginning in September 2018. Noted in future action plan.

Section 3 FUTURE LEARNING ACTIVITIES (ACTION PLAN)

What **new** professional development goals have you identified?

How and when will you action them?

Future Professional Development Activity 1		
Title of Activity/Goal	Learn intermediate IT skills to help with future survey contracts	Date Identified January 2018
Goal (aim)		
What skills / knowledge gaps you have identified	*Advanced Adobe®Photoshop image editing skills*	
Action (objective)		
What you plan to do to fill the gaps	I have identified the course I want to join but am unable to enrol until July for course in September 2018. I am on the waiting list and should receive an enrolment form from the college when the time comes.	
Target date		
Date by which you plan to fill the gaps	01 July 2018 for enrolling Provisional dates for course: 07 September 2018–28 June 2019	

Future Professional Development Activity 2		
Title of Activity/Goal	CPD grant/bursary funding	Date Identified March 2018
Goal (aim)		
What skills / knowledge gaps you have identified	Where to find sources of CPD funding. Writing grant funding applications	
Action (objective)		
What you plan to do to fill the gaps	Research funding providers (Icon Book & Paper Group?). Look at examples of completing funding applications online. Talk to colleague who recently received funding to attend overseas conference.	
Target date		
Date by which you plan to fill the gaps	End of May 2018.	

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