Re-thinking what you do
Case study: stepping outside your comfort zone

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**CPD: why bother?**

Don’t we do it anyway? Why formalise it? Alison Peck outlines a proposal for CPD in the ISTC, based on her presentation at TCUK 2012.

CPD (Continuous Professional Development) can be ‘mandatory’ (recorded and must be completed), 'optional' (recorded and may be completed) or 'obligatory' (not recorded but there is an ethical or other requirement to comply).

Using the above definitions, members of the ISTC are **obliged** to keep up to date, which effectively means 'do CPD'. However, the ISTC does not currently give any help or guidance, or even any clear recommendations. I believe we need to address this to support our members in taking control of their own learning, in particular by introducing them to or reminding them of reflective practice and reflection in learning.

Many of you probably feel you already keep yourselves up-to-date. After all, you’re reading Communicator right now, you check influential blogs regularly, you have team meetings and in-house training sessions. Isn’t this enough?

**Stakeholders in the CPD process**
The benefits of an ISTC CPD policy and process are wide-ranging and can be explored from the viewpoints of three main stakeholders, all of whom influence and affect the others.

**Benefits to individual ISTC members**
- Being able to state ‘I am a Fellow/Member of the ISTC, which means I undertake x amount of CPD...’ can be used as a differentiator at the application stage when looking for work. It may also be a huge advantage during appraisals/reviews.
- Being able to store all learning-related information in one place, including portfolio pieces or samples (copyright and commercial confidentiality allowing). This means they can quickly be gathered together to show existing and potential clients/employers.
- Gaining experience in reflective practice and reflective learning helps us obtain more benefit both from the formal training we undertake and the informal learning that is part of the normal working day.
- Being a member of the ISTC will – over time – become much more of a benefit in itself. We should aim to make membership synonymous with being highly professional and competent practitioners.

**Benefits to employers**
- Sending employees on training courses or to a conference is expensive. Linking it to a CPD programme – especially one that encourages reflection – helps to ensure maximum benefit is obtained, and proves relevance.
- Employers who already have a CPD programme will not have to change it – but for employers who do not, an ISTC programme has all the benefits for less effort (especially for those employing a single technical communicator or whose employees are dispersed across multi-discipline teams so are effectively lone technical communicators).
- Sourcing their employees from (or encouraging their employees to join) the ISTC will provide employers with technical communicators who can prove they have kept their knowledge and skills up-to-date. There is no need to compromise between fresh knowledge and experience.

**Benefits to the ISTC (and, by extension, to the ‘profession’ of technical communication)**
- We cannot call ourselves ‘professionals’ if we don’t do the things that professionals do – and be seen to do them.
- The ISTC will become an organisation that ‘professional’ technical communicators will want to join.

Instead of asking ‘Are you a member of the ISTC?’, the question should be ‘Aren’t you a member of the ISTC? Why not?’

**So what does this mean?**
Each of the benefits highlighted above only come into effect if the other benefits are realised – they are interdependent. However, we have to start somewhere.

Some of our members may also belong to other professional bodies or be employed by organisations that already have CPD schemes in place. We need to work with our members, and possibly these other organisations, to make sure we do not add to our members’ workload.

We need a flexible system that enables a personal record of CPD to be kept, enabling ISTC members to incorporate all relevant learning, no matter where it is obtained.

**Defining CPD activities**
Activities undertaken as part of a CPD programme need to be:
- **Measurable** – How much are people doing? Is that enough?
- **Relevant** – How does what individuals are doing help them grow professionally?
- **Enforceable** – Do we want to make CPD mandatory for members of the ISTC? All members or just some?
- **Realistic** – Is what we are suggesting achievable for our members, bearing in mind the different ways in which they work?

**Code of Professional Conduct**

When we join the ISTC, we agree to be bound by its Code of Professional Practice. Relevant extracts state:

- ‘We should aspire to the highest standards in ... professional growth.’
- ‘Maintain and develop skills to facilitate a high degree of ethical competence (that is, the responsible application of skills augmented by the sourcing of professional advice or assistance when the limit of those skills is reached).’
- ‘Conduct research and publish articles to build and share knowledge within the profession, mentoring entrants and supporting educators where possible.’
- ‘Take on work only when it is within existing capabilities or when a programme to attain required skills has been put in place.’
How can we measure CPD activity?

There are two main ways we can measure CPD – we can measure inputs (hours spent, what was studied) or we can measure outputs (what was learnt, what impact it had). In an ideal world, measuring output is the better way to go – but it is much harder to give guidance in response to the question ‘have I done enough’, especially if we decide to implement mandatory CPD in the future. For that reason, a combined approach may be more appropriate.

Proposal for measurement for the ISTC

A points-based system provides the flexibility our members need. If some individuals need hours-based measurements to comply with some other scheme, the points can be converted to hours fairly readily, and supporting such a scheme with reflective activity enables outcomes to be seen as well.

Deciding whether CPD is relevant

Counting how much CPD someone does is only part of the story. The point is not to have people thinking ‘I must do x points worth of CPD this year – I need to find a course quickly’.

Within a flexible CPD scheme, there is a subjective element to relevance. While core technical communication topics are likely to be relevant to the majority of us, other subjects may only be relevant to a minority. For example, it is easy to claim that audience analysis, topic-based authoring, writing for translation and developing Adobe® Captivate® simulations are relevant. It may be harder to convince others that attending a course on SQL Server architecture or are self-employed or operate your own limited company for the latter.

The way we can help to ensure relevance is to require that every valid piece of CPD is accompanied by a short piece of reflective writing. This reflection may be used to justify the category into which the learning activity has been placed when claiming an allocation of points. In some cases, this reflection could simply be a short statement that all learning aims were met; in other cases, it will form part of the learning process itself and be more involved.

To ensure that claims of relevance are reasonable, we could use a system of peer moderation. Granting access to appropriate sections of your CPD record to one or two other named members of the ISTC who work in the same or similar sectors or circumstances will provide an objective view and useful feedback.

Proposal for determining relevance for the ISTC

Qualifying CPD activities (those that are going to be used to reach the suggested minimum quota) must be accompanied by a short piece of reflective writing. This reflection may be used to justify the category into which the learning activity has been placed when claiming an allocation of points. In some cases, this reflection could simply be a short statement that all learning aims were met; in other cases, it will form part of the learning process itself and be more involved.

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Proposal for enforcing a CPD policy

We don’t want to make any changes in a hurry, so I suggest a gradual approach:

1. CPD is optional for all – we provide guidance, develop a policy and offer a recording/storage facility.
2. We introduce peer moderation. We need some form of verification for the CPD to be meaningful and this offers the greatest level of flexibility. Training would be offered in peer review of this sort, and would be trialled in a small pilot before being rolled out across the membership. The process of being moderated – discussing what you have learnt and its relevance as well as sharing any written evidence – is a powerful learning experience in its own right.
3. We consider introducing mandatory CPD for those wanting to advance to Fellow status.

Should a CPD policy be enforceable?

This needs some thought – and I would appreciate feedback from members, as it poses a dilemma.

If the ISTC’s CPD scheme is mandatory, will we lose members? Will members see CPD as just something else they are being forced to do?

If we leave it as voluntary, how likely are we to achieve many of the benefits of doing it in the first place? (‘I belong to the ISTC, and we can do CPD if we want to’ doesn’t have quite the same impact.)
4. We consider introducing mandatory CPD for those wanting to maintain Fellow status.

Is a CPD policy for the ISTC realistic?

If we adopt a points-based approach and accept reflection as evidence, then I believe that this is achievable for all our members. Some may achieve most (if not all) of the requirement by attending a relevant conference - and the reflective element will ensure that something has actually been learnt from the experience. Others may reach the requirement through entirely self-directed study or even as a by-product of their normal working practices. For example, the often extensive investigations undertaken when considering implementing a structured format such as DITA could form part of someone’s CPD record – with appropriate reflection – as the person carrying out those investigations will learn a lot!

There is a reliance on the professional integrity of the individual to only claim activities as CPD that are either a legal or other requirement to continue working as a technical communicator in a particular sector or where new learning or understanding has taken place. For example, as part of my job role I may need to deliver writing skills training to new engineers joining the business. Identifying new ways of training may well count as CPD, but delivering the same material repeatedly on a 3-month rolling basis does not.

Proposal for a realistic CPD policy in the ISTC

Although we will provide guidance on the ‘points value’ of learning, we will remain open to learning in all its forms and will support our members however they choose to maintain their skills.

We need to determine some quantity of points and the timescale over which they must be achieved to satisfy our CPD requirement. The number of points should be high enough that divisions are realistic. For example, we could decide that 60 points need to be earned over a 2-year period.

So, what’s next?

Introducing anything retrospectively is difficult. Although I personally would welcome CPD becoming mandatory for Fellows (so I could harvest the benefits of claiming membership), I appreciate that others may feel differently. Nothing will happen without further discussion – and if anyone is interested in joining a small working group, please get in touch.

We need to allow points to be associated with a wide range of activities. The activities listed in Table 1 are examples only and points are purely illustrative. A set of guidelines for points will have to honestly determine where their activities fit (and may choose to attempt to justify a higher points allocation if, for example a work-place investigation was very involved).

References


Member news

New Members

Member

Grant Birkin Derbyshire
Anthony Davey Aldersholt
Victor Don Derbyshire
Peter Edwards Nottingham
Diana Logan Bedfordshire
Bob Price Nottinghamshire
Tracey Torble Surrey
Geoff Watson Berkshire

Student

Elaine Gillingham Royston

Transfers

Fellow

Richard Burnham Shropshire
Tom Dumic Guildford
Uchit Luktuke Australia
John Mannix Stourbridge
Simon Mutton Cardiff

Member

Katarina Bovin Sweden
Janine John Cumbria
Peter Neate Kent

Junior

Janine John Cumbria

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