



· INSTITUTE · OF · HISTORIC ·
BUILDING · CONSERVATION

The home of the conservation professional

CONTINUING PROFESSIONAL DEVELOPMENT (CPD) IN THE IHBC

GUIDANCE NOTES

Introduction

The Institute of Historic Building Conservation, the IHBC, in common with other professional bodies, specifies ongoing training and development as a fundamental duty for an active professional. Consequently, Continuing Professional Development (CPD) is compulsory for Full Members of the Institute. CPD is also strongly recommended for Affiliates, individuals intending to become Full Members, and Associates, those members supporting our aims but not pursuing full professional membership with the IHBC.

CPD is a key tool for quality assurance and quality control in any professional involvement with historic environment conservation. CPD is essential if members, clients, the public at large, as well as our heritage, are all to benefit from the IHBC operating as a professional body for conservation specialists. CPD in the IHBC, guided by informed personal reflection on skills needs, expands individual professional abilities and standards in line with our Areas of Competence, and creates an open and positive approach to the continually evolving practice of historic environment conservation.¹

As conservation professionals, IHBC members are often qualified first in another profession or discipline. Such qualification is usually based on formal study, and only later do members specialise in conservation, often using work-based learning supplemented by dedicated training.² In the world of work, building and maintaining conservation skills means that members' training and educational needs are just as important as for students. However learning now takes on a much more varied and, often,

¹ See also the IHBC's guidance on membership standards and the Areas of Competence at www.ihbc.org.uk.

² See the IHBC's web-based guidance on routes to membership, as above.

a less formal character. The requirement to keep abreast of new and current developments and thinking in what we know to be a broad and diverse profession is never-ending, and members will be engaged in this effort on a daily basis.

In undertaking CPD, the Institute requires a planned strategy for skills improvement to ensure that it is effective, appropriate and relevant to considered needs. With such foundations, CPD should be formally recognised within the context of a member's career progression, in particular by employers. The IHBC also benefits from CPD in our membership. At national and branch level and together with many partners, we deliver a wide range of training opportunities. CPD helps inform our priorities for future activities.

What is CPD for an IHBC member?

Continuing Professional Development, or CPD, will be familiar to many members through their membership of other professional bodies. It is a procedure for encouraging personal reflection on the individual's particular priorities in the context of their professional development, how and where those needs might be addressed, what is learnt from the experience, and then feeding that progress back into a personal reflection on career progress. In this process CPD can deliver a virtuous upward spiral of increasing positive self-awareness, self-confidence and professional improvement and success.

To make proper use of CPD it is essential that you plan your professional journey in advance. You need to reflect on where you are in your career, then look ahead to where you think you should be in the future, and what you need to do to get there.

As in the management of any project, developing your professional skills through CPD requires two basic tools: a plan based on an assessment of needs, and the record of progress within that plan. The two parts of our CPD Registration Form, the Professional Development Plan and the Record Sheet, reflect the two parts in your CPD, the plan and the record, providing both structure for and evidence of your continuing professional development.

Clearly we can never be too precise about planning for learning opportunities that might arise, or how circumstances will change. Consequently it is essential that your planned CPD is treated with sufficient flexibility to allow you to take full advantage of any unexpected opportunities. Like any good plan, our CPD Registration Form should be seen as providing a framework for progress, not a barrier against it.

What counts as CPD?

When CPD was first introduced by professional bodies many imagined that it was restricted to attending seminars, lectures and similar formal training events. It was soon realised that this approach did not meet many members' needs. Yet, this narrow approach still informs many professionals' response to CPD. The IHBC encourages members to take a fully rounded approach to addressing their professional development requirements, one that reflects the complexity and cross-disciplinary nature of activities in historic environment conservation.

An individual must determine needs and priorities for their own personal professional development, and the IHBC provides the tools to support this determination.³ The IHBC's **4 Areas of Competence (One Professional, and 3 Practical)** and the 8 Competences that underpin them, outline generic areas of skills required of our members. Skills sets for the IHBC's members, represented by our Areas of Competence and the Competences, are identified in the table below, and in the appendix, which specifies them in more detail:

AREAS OF COMPETENCE:	PROFESSIONAL	PRACTICAL: EVALUATION	PRACTICAL: MANAGEMENT	PRACTICAL: INTERVENTION
	PHILOSOPHY	HISTORY	LEGISLATION & POLICY	DESIGN & PRESENTATION
COMPETENCES:	PRACTICE	RESEARCH, RECORDING & ANALYSIS	FINANCE & ECONOMICS	TECHNOLOGY

The Areas of Practical Competence reflect the primary specialist interests or disciplines within, or across, which our diverse membership operates. These range from historians and archaeologists specialising in 'Evaluation', and planners overseeing change through 'Management', to architects and building project managers specialising in 'Intervention'. The Practical Competences also cover the range of skills that are a pre-requisite of successful historic environment conservation. The IHBC uses the same terms and tools provided here to assess membership applications and CPD, bringing consistency to members' assessment and the IHBC's own evaluation procedures.

You can use the competence descriptions and the evaluation forms in the appendix to help estimate what levels you have already achieved within the Areas of Competence, and what particular needs you might address through CPD. Ultimately, as a Full member, only you can decide what best

³ The IHBC is committed to developing a Skills Development Framework, to support and guide training appropriate for historic environment conservation professionals. The most up-to-date information in this area is carried on our website at www.ihbc.org.uk.

fits your professional needs, and these will, almost certainly, change as your career progresses. Formal training may play a part in meeting your personal development needs, and the Institute's national and branch events will be part of what you require to keep up to date. So if you have a suggested topic for an event, please don't hesitate to contact your IHBC branch or the national office and let them know.

Sources of information and knowledge outside the IHBC are also important for skills development. Going on site and watching a craftsman scarf in a difficult timber frame repair might count if you are striving to improve your knowledge in this area. Similarly, exploring the closely argued legal point at a Public Inquiry; delving into the analysis of a client's financial submission for enabling development, or engaging in philosophical debate with your peers as to whether a proposed extension should match or be distinctly modern, are all areas that can all count towards CPD, provided they take you into new professional territory or explore new ideas.

What matters to us is not the form or origin of CPD, but its content and the relationship back to your professional needs (your piano lessons are unlikely to count!). CPD can be almost anything, so use your imagination.

Your obligations as a Full Member of the IHBC

Full Members must supply CPD registration forms when requested by the IHBC.

To ensure that our members abide by the IHBC's requirement for compulsory CPD, the Institute will call for CPD Registration Forms from Full Members at different times. You must supply your CPD Registration Form on request.

We do not doubt that all IHBC members undertake CPD training. However to ensure that our operations as a professional body and charity are credible and fair, the Institute will pursue members for CPD Registration Forms as far as necessary. This could even lead to withdrawing membership, by invoking the first and second articles of our Code of Conduct:

- 1 Those engaged in the conservation of historic buildings, areas and landscapes will adhere to the highest standards of ethical and responsible behaviour in the conduct of the conservation of such buildings and sites.
2. Members shall conduct themselves in a manner which will not bring the conservation of the built heritage or the institute into disrepute.

IHBC members do not address Article 1 without operating our structured CPD, and fail under Article 2 if they do not observe the terms of our CPD.

How do I fill in the forms?

The forms have been designed to be as simple as possible to use (there is a view that some professional bodies' CPD forms are overly complicated). They can be found and downloaded from the IHBC's web site (www.ihbc.org.uk). You can download and fill in the Word documents on your own computer, or simply handwrite them.

- 1/ Begin by filling in the personal details on the **Personal Development Assessment**. The details of your employment will allow the IHBC to relate your CPD to what you do.
- 2/ Next you should consider what you need to learn over the next 12 - 24 months to enhance your skills, knowledge and experience in such a fashion as to help you become a better professional. Using the guidance at the end of this document, you can compare your own strengths with the IHBC's guidance to map your achievement across the Areas of Competence and against the different levels achieved within the Competences. When you have identified your 'wish list', put these under **Aims and Objectives**.
- 3/ Fill in the Competences to which the aims relate in the next column. (E.g. learning more about timber frame repair will relate to at least Competences 1,2, 3 and 8).⁴
- 4/ Consider where and how you can find out more about the subject and get the information and/or training you require, and then fill in the details under **Means of Achievement**. You may not know at this stage what exactly you need to do, but it is important that you think about what research is necessary in order to meet the aim, and then list that. It will serve as a useful reminder.
- 5/ Under **Target Date** list by when you intend to satisfy the particular professional need. It may be that an aim relates to a specific work event that you need to be up-to-speed in time for. Equally, it may be that the aim is a continuous process of learning and 'Ongoing' will suffice.
- 6/ We will return to the next box about **'Have my aims been achieved?'** later.

Turn now to the CPD Record Sheet. Here you will maintain individual events or activities that you do over the period and evaluate how they relate to your assessment.

⁴ Please note that the numbering of our Competences has changed following their re-ordering under the Areas of Competence. From 2008 Members are expected to adopt the new numeration.

- 7/ **Date** is the date or dates of the event or activity.
- 8/ **Competence** should list those IHBC Competences, in line with the table at item 3 above, to which the event was relevant. Usually they will not simply coincide with your planned objectives, as for example our Annual School would ordinarily cover all Areas of Competence. It is also important that you document the personal professional benefits of the event as a whole, and not just those that you planned for, again reflecting the need to keep your plan flexible.
- 9/ Under **Activity and Value** members should describe the event or activity and then give a brief assessment of its value in achieving an **Aim and Objective** (as) listed in the **Professional Development Plan** (on page 1), or any other specific benefit that was produced by the activity.
- 10/ **Hours**. This should detail the time accrued during which you actually learnt something. If you attended a formal training event but, disappointingly, much of the day told you little you didn't already know, then you should honestly reflect that in the hours listed. It may have been 6 hours long but if only the last hour was genuinely informative, then you should list just the one hour. Conversely, if you informally meet a colleague who gives you a valuable run-through of a new topic, you should list the duration of the conversation.

A combination of 9/ and 10/ should give a rounded picture of what you've done and learnt to meet the Aims and Objectives in your Personal Development Plan and how both relate to the IHBC's Areas of Competence.

Start new Record Sheets as you need them, downloading them from the IHBC web page each time, as their form will necessarily evolve.

You should retain any evidence of CPD activity wherever possible, to verify and document the activities you list. This may include diary entries, notes from site visits *etc.*, as well as the more obvious formal CPD Certificates following events.

- 12/ At the end of each 12 month period - which for IHBC purposes we take as running from 1 April to 31 March - you should fill in the **Total hours** accrued. You should monitor this as the year progresses to assess if you are likely to meet the IHBC's requirement – which is 50 hours over a rolling two years.
- 13/ At the end of 12 months you should return to Page 1 and fill in the questions in the **Have my aims been achieved?** box. Hopefully, you will be able to give a positive response, but the possibility is that your new knowledge and skills will have either not entirely been fulfilled or, more likely, they will have revealed new areas and topics you have subsequently realised you need to know about. Such is the nature of Continuing Professional Development. **What else needs**

to be done? gives you an opportunity to think about how to fulfil the aim, while **Comments** should be used to jot down those further aims and areas for learning, or any other 'lessons' you've learnt that year that you want to be reminded of in subsequent years (**E.g. IHBC events all first class – must do more next year!**).

At the beginning of April each year you simply start again but this time carrying forward any aims or ideas from 13/ above. You may find that as you accumulate aims, some are satisfied, while there are new ones that the demands of work or the market place have made you realise you need to get up-to-speed on.

What should happen as you progress over the year and years is that you start to get a feel for what your strengths and weaknesses are and how to go about building up your professional abilities and skills so that you become a more consummate and self confident professional, better able to take a leading role in the conservation world.

You must take care to keep your CPD records and verifying evidence safe! It is probably best to keep them in a hard copy file at home or you could upload them to a free online storage facility (people change jobs and lose records kept at work - particularly on the work computer). The IHBC will not accept excuses for lost CPD forms; if you are unfortunate enough to lose them, you are required to re-create them as far as possible.

What happens next?

The IHBC, at short notice, calls in the CPD Records of a percentage of members each cycle for assessment. Where appropriate, these members will be selected at random, but the system will be adjusted to ensure that, over time, all members will, at some point, be called in. Any member who fails to submit their CPD Registration Form, or submits unacceptable CPD records, will be subject to individual scrutiny by the Institute and, where necessary, disciplinary action that could lead to expulsion. Any member whose CPD Records need further explanation will be required to respond in writing to questions and/or attend an interview. Should the outcome of this process be unsatisfactory, again the Institute will instigate appropriate disciplinary action, which will result in expulsion where unsatisfactory.

That said the Institute is confident that members will understand and recognise that CPD is primarily for the benefit of the individual members and for historic environment conservation. That is why the IHBC gives primary responsibility for the effective implementation of CPD to each individual member. It is also why the Institute encourages a flexible, imaginative approach. Formal and informal learning both have a place in the IHBC's CPD. Ultimately your CPD is a matter for your individual judgement. All the Institute asks is that you operate it honestly and effectively, structuring your plan and record in accordance with our

minimum requirement for time spent, a rolling 50 hours over any two successive years.

The Institute knows the strength and diversity of its members and is proud of the work we all do to preserve and sympathetically exploit the heritage. It trusts you will use the opportunity CPD offers to grow and show the world just how good you and the IHBC really are.

IHBC National Office 2008

CONTINUING PROFESSIONAL DEVELOPMENT (CPD) IN THE IHBC: APPENDIX

CONSERVATION SKILLS DEVELOPMENT FRAMEWORK: EVALUATION TOOLS FOR THE AREAS OF COMPETENCE & THE COMPETENCES

Members are advised to refer to the Institute's current guidance for applicants, posted on our website's membership pages *Membership Standards, Criteria and Guidelines* (2008). The 'competences' provide an outline of the skills, knowledge and experience required to fulfil the requirements of institute membership.

AREA OF COMPETENCE: PROFESSIONAL

1 PHILOSOPHY

Appreciation of the social, cultural, political, aesthetic, economic and environmental values that underpin current conservation policy and practice:

- To be fully conversant with currently prevailing national and international principles and philosophies of conservation including guidelines adopted by ICOMOS, BSI and other recognised bodies.

2 PRACTICE

Awareness of the wider context of conservation, including knowledge of and ability to interact effectively with all bodies and individuals who have a significant role to play in the field:

- To be familiar with the roles, responsibilities and potential of all bodies and individuals within public, private and voluntary sectors who have a significant heritage management role
- To be able to establish and maintain good contact with and seek specialist advice from other organisations and individuals both within and outside the conservation field and inform others of the availability of such advice
- To be able to interact and negotiate effectively with all groups and individuals with an interest in the historic environment including community and amenity groups, elected representatives, clients, applicants and officials.

AREA OF COMPETENCE: PRACTICAL – EVALUATION

3 HISTORY

Knowledge of the development of the historic environment including the remains of previous periods and cultures, historic buildings and settlements, works of engineering, parks, gardens and other elements of the historic landscape:

- To be able to assess the significance of sites, structures, buildings and areas and carry out both visual and archival research and make recommendations based on such assessment
- To be able to advise on the special importance and the suitability for designation, listing, scheduling or other means of protection of the above features
- To be able to assess the significance and impact of development proposals on the above features.

4 RESEARCH, RECORDING & ANALYSIS

Ability to carry out or commission research, analysis and recording of the historic environment, and to maintain records accordingly:

- To be able to advise on appropriate techniques and levels of recording required for historic buildings or sites affected by development proposals and identify the most appropriate bodies or individuals to undertake such work
- To be able to make rapid and emergency recording of buildings and groups of buildings affected by development proposals including archival research

- To be able to plan, prepare and execute a programme of detailed recording of structures and sites affected by development proposals, including photographic and graphic representation using conventional drawing techniques and/or CAD.

AREA OF COMPETENCE: PRACTICAL – MANAGEMENT

5 LEGISLATION & POLICY

Knowledge of the legislative and policy framework for the conservation of the historic environment, its formulation locally and nationally, and awareness of other relevant legislation and policies:

- To be able to provide advice and guidance on all current legislation and central government advice affecting the protection of the historic environment to employers, clients, public, other professionals and statutory and non statutory organisations
- To be able to advise and negotiate in connection with applications for listed building, scheduled monument and conservation area consent and planning permission and other statutory consents
- To have a working knowledge of other legislation insofar as it affects the historic environment including the Building Regulations, town planning and highways legislation
- To be able to act as the employer's/client's expert witness as appropriate at appeals, public inquiries or court hearings. To be able to appreciate the status and application of differing types of policy documents
- To be able to draw up, implement and monitor conservation policies and strategies in the context of either local or national frameworks and to be able to advise on the conservation implications of other policies.

6 FINANCE & ECONOMICS

Understanding of the process for the procuring of buildings and facilitating development, including finance, valuation, cost planning and contracts, with specific reference to historic buildings and areas:

- To understand the process by which decisions are made on investments in conservation projects and the factors affecting such decisions; and, specifically, familiarity with the workings of the property market and methods of valuation
- To be familiar with the contractual aspects of conservation work including differing forms of contract, costing of conservation works and VAT
- To be familiar with the principles of regeneration, the bodies responsible for it and of sources of funding which can be used for the repair of historic buildings, and the ability to seek and use resources effectively
- To be able to promote or generate investment in the historic environment from both public and private sources and to maximise grant opportunities
- To be able to advise on conservation grant availability and be fully conversant with the administration of grant schemes for the repair and enhancement of historic buildings and areas
- To be familiar with, and be able to advise on, the range of available funding schemes not specifically aimed at conservation including; – The National Lottery – European funding – central government regeneration budgets – other partnership schemes.

AREA OF COMPETENCE: INTERVENTION

7 DESIGN & PRESENTATION

Ability to analyse and evaluate quality of design, existing and proposed, of buildings and areas, and to present the results of such analysis in a way understandable to both professional and lay audiences:

- To have a detailed appreciation of the principles of townscape and urban design and to be able to undertake analysis accordingly
- To be able to communicate design concepts in three dimensions by means of sketching, conventional drawing techniques and/or CAD

- To be able to promote high standards of design of individual buildings or areas by: – drawing up and implementing schemes – preparing design guidance/ briefs
- To be able to prepare schemes of enhancement including streetworks and landscaping.

8 TECHNOLOGY

Knowledge of building construction of all periods, the characteristics of structures, the nature and properties of building materials and appropriate methods of repair and alteration of historic fabric:

- To be able to advise on appropriate methods for the repair and maintenance of historic buildings including advising on specialist repair techniques and the availability of materials and skills both locally and nationally
- To be able to advise on the physical and chemical characteristics of building materials and causes of decay
- To be able to assess and monitor the condition of buildings, diagnose defects and to specify and prioritise proposals for their repair, maintenance and enhancement
- To be able to undertake both rapid and more detailed assessments of building condition, including buildings at risk surveys
- To be able to audit and monitor the general condition of fabric within whole areas with a view to formulating strategies for action
- To be able to advise on new and developing techniques in conservation and their practical implications.

IHBC ASSESSOR'S GUIDANCE: MATRIX OF LEVELS (to be used with current *Guidance for applicants*, www.ihbc.org.uk)

APPLICANT:	REF:	NOTES TO SUPPORT FEEDBACK FORM, p.2 (<i>Digital fields expand</i>)
AREA OF PROFESSIONAL COMPETENCE		
1. PHILOSOPHY: Appreciation of the social, cultural, political, aesthetic, economic and environmental values that underpin current conservation policy and practice		U/A/C/S/E*
2. PRACTICE: Awareness of the wider context of conservation, including knowledge of and ability to interact effectively with all bodies and individuals who have a significant role to play in the field		U/A/C/S/E*
AREA OF PROFESSIONAL COMPETENCE DEMONSTRATED TO LEVEL (Unaware/Aware/Capable/Skilled/Expert):*		
AREA OF PRACTICAL COMPETENCE: EVALUATION		
3. HISTORY: Knowledge of the development of the historic environment including the remains of previous periods and cultures, historic buildings and settlements, works of engineering, parks, gardens and other elements of the historic landscape		U/A/C/S/E*
4. RESEARCH/RECORDING/ANALYSIS: Ability to carry out or commission research, analysis and recording of the historic environment and to maintain records accordingly		U/A/C/S/E*
'EVALUATION' AREA OF COMPETENCE DEMONSTRATED TO LEVEL (Unaware/Aware/Capable/Skilled/Expert)*		
AREA OF PRACTICAL COMPETENCES: MANAGEMENT		
5. LEGISLATION/ POLICY: Knowledge of the legislative and policy framework for the conservation of the historic environment, its formulation locally and nationally, and awareness of other relevant legislation and policies		U/A/C/S/E*
6. FINANCE/ ECONOMICS: Understanding of the process for the procuring of buildings and facilitating development, including finance, valuation, cost planning and contracts, with specific reference to historic buildings and areas		U/A/C/S/E*
'MANAGEMENT' AREA OF COMPETENCE DEMONSTRATED TO LEVEL (Unaware/Aware/Capable/Skilled/Expert)*		
AREA OF PRACTICAL COMPETENCES: INTERVENTION		
7. DESIGN/ PRESENTATION: Ability to analyse and evaluate quality of design, existing and proposed, of buildings and areas and present the results of such analysis in a way understandable to both professional and lay audiences		U/A/C/S/E*
8. TECHNOLOGY: Knowledge of building construction of all periods, the characteristics of structures, the nature and properties of building materials and appropriate methods of repair and alteration of historic fabric		U/A/C/S/E*
'INTERVENTION' AREA OF COMPETENCE DEMONSTRATED TO LEVEL (Unaware/Aware/Capable/Skilled/Expert)*		
FULL MEMBERSHIP RECOMMENDED (Y (YES) OR N (NO))**		(Y/N)

* Circle or write as preferred, indicating IHBC Skills Level (*SEE GUIDANCE OVERLEAF*): U=Unaware; A=Aware; C=Capable; S=Skilled; E=Expert

** *Successful applicants must demonstrate:*

- *At least C (capable) level in the Area of Professional Competence,*
- *At least C (capable) level overall in the Areas of Practical Competence, made up from a minimum 2Cs and one A*
- *No U levels in any area accepted.*
- *See membership guidance for details on Areas of competence*

CPD Certification Service*	S/NVQ Level*	DREYFUS MODEL*	Knowledge	Standard of work	Autonomy	Coping with complexity	Perception of context
Unaware (U) <ul style="list-style-type: none"> unaware of subject area possess little or no knowledge/skills require full training and development] 	2	Novice	Minimal, or 'textbook' knowledge without connecting it to practice	Unlikely to be satisfactory unless closely supervised	Needs close supervision or instruction	Little or no conception of dealing with complexity	Tends to see actions in isolation
Aware (A) <ul style="list-style-type: none"> possess basic knowledge/skills unable to work without supervision require training/development and more in-depth information 	3	Beginner	Working knowledge of key aspects of practice	Straightforward tasks likely to be completed to an acceptable standard	Able to achieve some steps using own judgement, but supervision needed for overall task	Appreciates complex situations but only able to achieve partial resolution	Sees actions as a series of steps
Capable (C) <ul style="list-style-type: none"> possess adequate knowledge/skills able to work with some autonomy able to work effectively as part of team require guidance/some further training 	4	Competent	Good working and background knowledge of area of practice	Fit for purpose, though may lack refinement	Able to achieve most tasks using own judgement	Copes with complex situations through deliberate analysis and planning	Sees actions at least partly in terms of longer-term goals
Skilled (S) <ul style="list-style-type: none"> possess requisite knowledge/skills to perform effectively and efficiently able to work with considerable autonomy need occasional top-up training 	4/5	Proficient	Depth of understanding of discipline and area of practice	Fully acceptable standard achieved routinely	Able to take full responsibility for own work (and that of others where applicable)	Deals with complex situations holistically, decision-making more confident	Sees overall 'picture' and how individual actions fit within it
Expert (E) <ul style="list-style-type: none"> acknowledged by others as an authority very substantial personal autonomy 	5	Expert	Authoritative knowledge of discipline and deep tacit understanding across area of practice	Excellence achieved with relative ease	Able to take responsibility for going beyond existing standards and creating own interpretations	Holistic grasp of complex situations, moves between intuitive and analytical approaches with ease	Sees overall 'picture' and alternative approaches; vision of what may be possible

*INDICATIVE ONLY: For CPD Certification service see <http://www.cpduk.co.uk/intro/intropage.htm>. S/NVQ 'old style' for comparison only. The Dreyfus Model of skills acquisition classifies skills acquisition within a single discipline. Under the IHBC's multi-disciplinary membership criteria it can serve only as a guide. Table adapted from the Dreyfus model of skills acquisition: Dreyfus, S E (1981) and Dreyfus, H L & Dreyfus, S E (1984) & S Lester for PACR (Institute of Conservation)

