

**CONTINUING PROFESSIONAL DEVELOPMENT**  
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**DEVELOPING EXCELLENCE...**

## **Introducing Continuing Professional Development**

Continuing Professional Development (CPD) is a process of planned continuing development of an individual throughout their career. This enables the individual not only to gain knowledge and new skills, but also to add to the body of professional knowledge. Through this, the professional competence of the practitioner is enhanced and their workplace also benefits. CPD is achieved through reflective practice and training.

### **A Foreword from the Chairman of the Society of Archivists' Education, Training and Development Committee:**

*The promotion of lifelong learning, professional training and access to educational activities are key objectives for archival policy bodies, including Resource. Within the Society of Archivists, provision of Continuing Professional Development frameworks and opportunities is a critical service to members. The Committee provides a forum for supporting and developing CPD within the sector.*

*The significant and substantial report of the Continuing Development Working Party (now a Sub-Committee) accepted by Council in late 2000 has given new emphasis and direction to the Committee's work supporting CPD within the Society. A particularly welcome aspect of the work is the number of new entrants to the professions who are actively involved in developing the CPD frameworks.*

*As Chairman of the Education, Training and Development Committee, I welcome the publication of this booklet on continuing development. I hope that it will inform and inspire members of the Society to develop their skills and knowledge still further.*

**Elizabeth Shepherd**

### **Using this booklet**

This booklet has been divided into 2 sections:

- I **Continuing Professional Development in Practice** – this section contains extracts from case studies to demonstrate the benefits of CPD, suggestions on how to maintain your professional development, and advice on planning your CPD.
- II **Getting Support for your CPD** – this section outlines the sort of support you should expect from your employer, and the support the Society of Archivists and other professional organisations can provide for your development.

## I Continuing Professional Development in Practice

CPD can seem like just another hoop to jump through – demanded by employers and professional associations - but of no worth to the individual. The following extracts from case studies written by archive professionals working in different fields and at different stages of their careers, demonstrate that, in reality, CPD can be of great benefit to the individual.

The contributors are:

**Lynda Barraclough**, Archivist

**Keith Batchelor**, Consultant Records Manager

**Liz Bowerman**, Archive Conservator, Jersey Archive

**Alan Cameron**, recently retired Manager, Bank of Scotland

**Mary Clapinson**, Keeper of Special Collections and Western Manuscripts, Bodleian Library

**Carolynne Cotton**, Local Studies Librarian and Archivist, London Borough of Hillingdon

**Jan Hargreaves**, Archivist, Lancashire Record Office

**Simon Hopkins**, Conservator, West Sussex Record Office

**Brian Lloyd**, recently retired Conservator, East Sussex Record Office

**Richard Nichols**, ??????

**Linda Ramsay**, Conservator, National Archives of Scotland

**Helen Redmond-Cooper**, Archivist, Bank of Scotland

**Charlie Turpie**, Deputy Keeper, Guildhall Library Manuscripts Section

## **The Benefits of CPD**

### **Getting the most out of your job...**

*To be a good archivist/records manager I not only need to keep up to date with professional issues, I also need additional skills. I need to be an effective administrator and communicator, I need secretarial skills and report writing skills, and I need time management skills. CPD means having a holistic approach to what I do.... It allows the job to get the most out of you, and more importantly, it allows you to get the most out of this wonderfully varied and exciting profession.*

**Lynda Barraclough**

### **Opening new horizons...**

*My first, and only, job was with the London Borough of Hillingdon as Local Studies Librarian and Archivist... Over the years I realised that although I was managing the archive side of the job I was not really sure how well I was doing, despite having attended a number of relevant courses and meetings. So I decided to undertake the Society's diploma course. My employers agreed to fund the course and allowed me some time at work to complete the study. I found the course a real eye opener. The introduction to other aspects of archive work, such as records management, which I had never considered before has broadened my horizons. It has also boosted my confidence.*

**Carolynne Cotton**

### **Avoiding boredom...**

*CPD is about building skills, maintaining them and developing new ones. For me it's a mixture of avoiding boredom by not doing the same thing all the time, and contributing to the profession by doing the job well.*

**Jan Hargreaves**

### **Coping with change...**

*Since I first began work there have been enormous changes in both libraries and archives that have affected the way in which we work. The most profound of these has been the advent of computers. Working within a large library service I am currently receiving training funded by NOF which aims to improve the ICT literacy of the library staff.*

**Carolynne Cotton**

*Conservation is a field that is continually changing and evolving. Some change is easily defined and understood: change of this nature can be the subject of lectures, seminars or written articles. There is also a subtle and ongoing evolution of practice and ideas. This process is carried out by many means ranging from the private development of processes to networking and the exchange of ideas. Continual change means that it is vital for Conservators to keep up to date. It is also desirable for them to be a part of the process of change.*

**Richard Nichols**

## **What is CPD?**

CPD is not just another word for training. Good training courses can be a great resource, but CPD is about learning in all kinds of ways – both in and out of the workplace. This means that even if you are working in the most under-funded of organisations, you can still do CPD.

## **Reflective practice**

We learn from our mistakes and from our achievements. Reflective practice means taking time to think about the way we have completed a project - what was successful and what we might have done differently. More generally, it can be extremely rewarding to analyse working practice and systems.

*I have found through my career that it is best to keep learning. By always being open to new ideas you can judge what is worth applying and what is worth keeping from the past. Not all new ideas are good just because they are new.*

**Carolynne Cotton**

*More than once I learned from my mistakes. First jobs show you that you don't always do things the way you're taught to on the course. Working with the public shows you that not everyone is interested in the theoretical niceties of the job. One of my first lessons was to find a way of satisfying the need for professional standards at the same time as satisfying the public's need for easy access.*

**Jan Hargreaves**

*Like a majority of record managers/officers/registry officers – call us what you may – I started by being thrown into the deep end with no prior knowledge and having to learn by the seat of my pants and my mistakes. Back in 1964 when I started I was unaware of any courses or books on the subject...Am I still learning? Yes I am – by my own mistakes, putting right the mistakes of others, by sharing experiences between colleagues and by helping others to produce better working conditions and systems.*

**Keith Batchelor**

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## Learning in the workplace

*Learning on the job is a major component of professional development and is essential for job satisfaction. Depending on the size and set-up of your office you may get to steer a project through all of its stages, from planning and budgeting, through execution, to completion and evaluation. Or maybe you are contributing an element to the whole. Either way it doesn't matter so long as you are developing your skills and learning from the experience.*

**Helen Redmond-Cooper**

*The Bank's tercentenary in 1995 was both exciting and exhausting for all in the department. Two Bank histories were produced, a major exhibition prepared, and a European banking history conference organised. Alongside this went innumerable briefing notes, speeches, presentations, and meeting demands from our branch network and public relations for all sorts of information, illustrations and so on. There is no doubt that 1995 was a major career highpoint for me.*

**Alan Cameron**

*Since March 2000, my new post has driven my CPD. Becoming the first Archive Conservator in a relatively new archive service and new building has meant that administrative and managerial activities have taken the majority of my time. Many of the activities were unfamiliar to me.*

**Liz Bowerman**

*No matter where you work or what you do, from cataloguing, to assisting researchers, to making policy decisions about electronic records management, everything involved in archives and records management demands that you take on new information and use this information to perform better at your job.*

**Lynda Barraclough**

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## Learning outside the workplace

*Being a parent and a manager is a considerable cross-fertilisation of skills and experience. Learning not to worry about little things and focus on the big and important issues – this I can do at work more easily but I realised how crucial it was at home first. I'm also learning to listen (really listen, not just stop talking myself) to what the other person is trying to say.*

**Charlie Turpie**

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## **Researching and reading**

Everyday activities such as reading professional literature and researching problems and new techniques are important to CPD.

*Opportunities for professional development come in many forms. Courses and conferences are great, but sometimes expensive. A good way to keep up to date is to read. The Society of Archivists has an excellent Journal, as do the American, Canadian and Australian Societies. The internet is a superb source of information on what other archivists and records managers are doing, from government policies on email and electronic records to the latest projects in digital preservation.*

**Lynda Barraclough**

*As budgets were stretched to fund my conservation training I supplemented my practical training with intensive reading of professional literature...*

**Linda Ramsay**

*It is very difficult to keep up with wider developments...when you work part-time and have no free time in the evening or weekends to catch up. I read the Society's Journal and Newsletter on the tube, as it is hard to find time at work. I do browse through the vast range of history journals, family history magazines and local history publications...trying to fit them in in an odd moment here and there.*

**Charlie Turpie**

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## **Structured formal learning**

Within our profession there are schemes such as the Registration Scheme provided by the Society of Archivists and Professional Accreditation of Conservator-Restorators (PACR) provided by the National Council for Conservation-Restoration. Formalised learning can also be implemented in the workplace.

*From the start my outlook was never to do something just for the credits: the fact they could be credit-worthy was another benefit from wanting to do something different, to broaden my experience and develop from it.*

**Simon Hopkins**

*Wherever possible we plan ahead, identifying individual training needs, drawing up a programme and budgeting accordingly. Pre and post-course briefing sessions are held to discuss the purpose of the training, identify specific objectives and review the outcomes.*

**Helen Redmond-Cooper**

*The actual process of working through the [Society of Archivists' Diploma] course made me look at how I worked and the systems in place in my office, how these could be improved and, just as important, what we were doing right. I hope to continue this process whilst completing my registration portfolio and then to carry it on through the rest of my career.*

**Carolynne Cotton**

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### **Networking with other professionals**

This does not have to be limited to people within your own professional discipline or working environment.

*Information and conference notes are swapped with colleagues nationally, and we have developed good relationships with conservation workshops of different disciplines locally, which promote informal exchanges of information.*

**Linda Ramsay**

*I attended annual instructional meetings for archive conservators from 1973 to 2000. This is the most important meeting of the year. These meetings were convened for Conservators all over the country to meet and discuss all aspects of the profession. While attending lectures and seminars friendships are formed. These friendships establish contacts countrywide and form a wealth of experience in all aspects of conservation.*

**Brian Lloyd**

*Training events also offer valuable opportunities to network. Maintaining a range of contacts whose skills and expertise differ from your own, and from whom you can seek advice or support, can only enhance your effectiveness and professionalism.*

**Helen Redmond -Cooper**

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### **Contributing to the profession**

Working to actively advance your profession can be an important part of your CPD. This could take the form of serving on a professional committee, publishing work which is of value to other professionals, editing a professional journal or lecturing.

*These last two years, I have returned to learning on the job, though this time the 'job' has been chairing the Society of Archivists. I have had plenty of occasions to practise steering meetings to a successful conclusion in a set time, contributing to debate, presenting the professional view to departments of state and other government bodies, and writing responses to an apparently endless stream of consultation papers and reviews.*

**Mary Clapinson**

*Serving on the Preservation and Conservation Group Executive Committee of the Society has proved a valuable means of making a contribution to the profession, and has given me the opportunity of getting to know far more people than may otherwise have been possible.*

**Simon Hopkins**

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### **Learning from colleagues**

This can take many forms – ranging from receiving informal coaching from colleagues with specific skills, to listening to colleagues reporting back from training events.

*I was fortunate to have two mentors, David Vaisey and Dr Molly Barratt who between them taught me first how to index, arrange and list, and then how to supervise the reading room and to answer enquiries. They encouraged me to edit records for publication, to write articles for local historical journals, to teach evening and postgraduate classes. For much of my career, therefore, my professional development was an informal process, entirely dependent on the good will and time of senior colleagues, to whom I remain indebted.*

**Mary Clapinson**

*All training is shared. On return from a course or seminar the person who has attended the course reports back in writing and talks to colleagues, demonstrates any new skills learned as well as passing around any relevant literature gained.*

**Linda Ramsay**

*In my second post there was more on-the-job learning, but I was able to develop particular interests, adding useful strings to my archival bow. As part of a larger team I learned new skills such as supervising staff and negotiating with colleagues. Working with and learning from others at different stages of their careers is a good way to develop your own.*

**Jan Hargreaves**

*My preferred way to learn IT is to find a patient 'guru', i.e. a colleague who knows what they are doing and can show you/teach you/do it for you, as appropriate.*

**Charlie Turpie**

## Teaching and training others

*The most useful approach to learning I have found is to train other members of staff. Teaching graduate archive assistants or junior archivists forces me really to understand what I am trying to teach. They might ask difficult questions so I need to be able to come up with convincing answers!*

**Charlie Turpie**

*An opportunity of particular importance to me came from the College where I did my initial training, when I was asked to lecture on conservation to their part-time bookbinding students. As a result of the lecturing... I was also asked to give a talk to the Society of Bookbinders on parchment.*

**Simon Hopkins**

*Giving something back:*

*I have lectured on: Seal conservation; Annual Instruction Meeting - September 1981; Seals on Exhibition – Nottingham 1988; The history and practice of ledger binding to the Conservation and Preservation Group – Wales 1988; An Estate Map and its conservation – London, 2000. I have been an Instructor in Archive Conservation since 1978 on the Society Training Scheme for Archive Conservators.*

**Brian Lloyd**

*[At Nottingham University] there was a public search room, and for the time, a full range of archival, exhibition and teaching duties, in which I participated fully... Adult education teaching and the production of archive resource packs also figured in these years....*

**Alan Cameron**

*Having a trainee will also encourage me to consider my own work practices.*

**Liz Bowerman**

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## Learning management skills

*In 1991, I moved from being the sole conservator to my present position managing a team of 8 conservators with direct responsibility for the continuing professional development of my colleagues.*

**Linda Ramsay**

*[I have been] increasingly asked to take on a new role as a senior Bank administrator and team leader. In some ways traditional archive work has been the sufferer, because of the immediate demands of an operational area, and the pace of change demanded. Most of my training/experience of these last five years has been in management, personnel and financial matters.*

**Alan Cameron**

*Only when I became head of department...did I begin to attend formal courses and consciously to develop the skills necessary for my new role. Probably the most interesting course and certainly the most effective was one run by women for women newly appointed to senior management posts.*

**Mary Clapinson**

## **CPD Planning**

It is important to plan your CPD so that you make sure your professional needs are being met.

*From my own personal experience not all training lives up to expectations and it is important to plan development carefully.*

**Linda Ramsay**

*To be effective, training must be targeted and timely. You owe it to yourself and your employer to establish the objectives of any event, and who it is aimed at, before you commit valuable resources. I've failed to do my homework in the past and ended up on a 2 day course designed to improve my lending skills! Likewise I've been on IT courses but not needed the skills for some months, by which time I've forgotten it all.*

**Helen Redmond-Cooper**

*Moves towards automating the cataloguing of manuscripts and archives in the Bodleian have gathered pace and retro-conversion of published and typescript catalogues is underway. Although up-to-date with national and international developments, I conspicuously lack detailed knowledge of Encoded Archival Description. So the next step in my development is to be re-skilled in that vital area of professional expertise.*

**Mary Clapinson**

## II Getting support for your CPD

### Support from your employer

*Good employers recognise the benefits of staff training and development – I've certainly been fortunate in this respect. Bank of Scotland actively encourages self-development (or 'empowerment') at every level. All staff can borrow from the Learning Centre, a resource of thousands of books, videos and CDs on subjects as diverse as risk awareness and time management, to psychology and public relations.*

**Helen Redmond-Cooper**

*It must be noted that continuing professional development cannot take place unless you have the support and commitment of your employer to finance and agree to day release to attend any courses, conferences or placements to develop your skill and potential to the full.*

**Brian Lloyd**

*The office where I currently work is large, giving plenty of scope for further professional development. There is recognition that investing in staff benefits the office, the individual and the profession as a whole.*

**Jan Hargreaves**

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### Support from the Society of Archivists

#### 1 Special Interest Groups (SIGs)

The following quotations taken from information provided by Society SIGs demonstrate the ways in which the groups support members' CPD:

**Archives in Education Group (AiEG)**  
**Business Records Group (BRG)**  
**EAD/Data Exchange Group (EADG)**  
**Film and Sound Group (FSG)**  
**Preservation and Conservation Group (P&CG)**  
**Records Management Group (RMG)**  
**Specialist Repositories Group (SRG)**

Please see the current issue of the Year Book or the Society website <[www.archives.org.uk](http://www.archives.org.uk)> for SIG contact details.

### Supporting and representing the membership

The SIGs have CPD at the very heart of their role. Each group helps to shape, direct and represent the Society's membership in their particular specialism.

*The group's role in bringing emerging issues and developments in its area to the attention of the membership is also evidenced by talks on such subjects as the Collection Description Focus and the Government's developing standards on interoperability and metadata.*

**EADG**

*The PCG represents the preservation and conservation interests of Archives professionals whether in a private or national institution, record office or company archive.*

**P&CG**

### **Direct training provision**

Each SIG has an appointed training officer and they aim to organise at least one event per year that is relevant to their particular specialism. Details of these events can be found in the Society's Training Brochure, which is produced twice a year and is also available on the Society's website <[www.archives.org.uk](http://www.archives.org.uk)>.

The Groups also contribute to the Society's Annual Conference and representatives of the P&CG plan the programme for the Annual Conservation Training Conference.

*The P&CG provides support to the membership with a programme of training events and seminars that support Preservation and Conservation.*

**P&CG**

*Direct training is provided for newly qualified archivists, and offered in the form of workshops and talks on demand; these have been given at national and international conferences in the past by FSG members.*

**FSG**

*As a recently formed group we have taken great care to consult our membership and this consultation has shaped the training programme. The programme will be regularly reviewed.*

**BRG**

*This year's AGM included training sessions on Freedom of Information and ISO15489.*

**RMG**

### **Disseminating information**

Many Groups have produced special themed SoA newsletters and best practice guidelines. Each group can be accessed via the Society's website <[www.archives.org.uk](http://www.archives.org.uk)>.

*The most exciting development has been the launch of the Group's pages on the Society's website. As well as contact details and general information, there is a 'document bank' section where copies of documents with transcriptions and notes for teachers will be available.*

*It is hoped that members will contribute documents from their repositories and that the site can be used to promote education resources across the country.*

**AIEG**

*SRG's aims include the publication of news and information in the biannual SRG News.*

**SRG**

*FSG publications are particularly useful: a twice-yearly newsletter for members contains articles, contacts, reviews, news and reference information. In addition there is the Best Practice Guideline for non-specialists, and the Film and Sound Archive Sourcebook, a reference work, which should be used in conjunction with the Guideline for full effect.*

**FSG**

*Reports on training days and speakers' papers are circulated to all members so that those unable to attend can still have full access to information.*

**BRG**

*The P&CG helps to shape, direct and represent the SoA and its membership in the field of Archival Preservation and Conservation. It has an Executive Committee that meets four times a year, the members of which also sit on other Society committees and maintain links to other organisations with similar interests. This is both to put forward the views of the P&CG and the membership of the Society and to report on developments within and outside the Society of Archivists.*

**P&CG**

### **Working with other professionals**

Recognising that we are not alone, the Groups actively promote links with other professional organisations.

*We provide reciprocal support to other Societies such as the United Kingdom Institute of Conservation [UKIC], Institute of Paper Conservators [IPC] and Society of Bookbinders.*

**P&CG**

*One of the SRG's roles is outreach to those outside the Society who are responsible for the preservation and conservation of records, in particular through five affiliated groups – the Religious Archivists Group, Historic Houses Archivists group, Charity Archivists and Records Managers Group Scientific Archivists Group and Political Parties and Parliamentary Archives Group, United Kingdom.*

**SRG**

*The group is currently holding informal discussions with the Records Management Society about providing joint run events.*

**RMG**

*In order to keep up to date with developments the group sends representatives to the Historical Association and the British Association for Local History. More recently we have established links with the Qualifications and Curriculum authority and are now sending a representative to their termly subject association meetings.*

AiEG

### **Contributing to the profession**

All the Groups participate in the development of the profession by encouraging and providing opportunities for the discussion of important issues.

*Some of the many issues we have developed or been involved in recently are: Accreditation and Registration; A Code of Ethics for Conservators; Best Practice Guidelines for Conservators; providing input on BS5454 and BS 4971; production and publishing of the Directory of Suppliers; updating the Glossary of Terms; providing input to 'Resource: the Government policy on Archives' action plan; providing input to the HMC for the revised guide 'Standards for Archive Repositories'; updating the Society of Archivists' Training Scheme for Conservators.*

P&CG

*The group sees itself as a forum for discussions relating to the development of EAD. Special meetings were held, for example, to elicit comments from UK users on changes that had been suggested to the EAD format. These comments were then fed into the international body responsible for the standard, the EAD Working Group.*

EADG

*A member of the Group's Executive Committee participated in the Society's Regular Training Working party.*

RMG

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## **2 CPD and Society Boards and Committees**

The Society of Archivists provides training and development opportunities in order to support members' CPD. There are also a number of committees and boards that have a direct impact on CPD.

Contacts for the following can be found in the most current Society Year Book or on the website <[www.archives.org.uk](http://www.archives.org.uk)> .

### **Continuing Development Sub-Committee (CDSC)**

The CDSC is working to provide support for members wishing to learn more about CPD and its benefits. The CDSC's work currently includes the following projects:

- Producing an introductory guide to CPD on the Society's website
- Writing a personal CPD planner for a pilot project
- Developing a mentor scheme for all levels of the membership

- Developing regular training programmes for all levels of membership

### **Single Module Certificates**

Originally developed for the Society's Diploma in Archive Administration, these are one of the CPD options offered to members. To obtain a certificate, written assignments involve research and, occasionally, some practical work.

There are seven available modules:

- Business Archives.
- Palaeography and Diplomatic
- Ecclesiastical Records
- Estate Archives
- Records of Central and Local Government
- Scottish Law, Government and Records
- Audio-visual Archives

### **Conservation Board of Studies**

Training placements are offered as single modules to conservators in the following archive conservation subjects: *Introduction to Archive Conservation; Conservation of Paper Archives; Conservation of Parchment; Conservation of Maps and Plans; Conservation of Seals; Archive Bookbinding and Book Conservation*. The placements vary in length depending upon the subject and may be adjusted according to the existing knowledge and experience of trainees. This provision addresses the needs of recently trained conservators seeking specialist training and as an opportunity for experienced conservators to develop a new area or as a refresher. They are an opportunity for CPD and for helping conservators who are working their way towards Professional Accreditation for Conservator-Restorers. The Board continues to offer a biannual week of lectures on archive conservation and a biannual conservation chemistry residential course.

### **Professional Accreditation for Conservator-Restorers (PACR)**

In 1999, the Institute for Paper Conservation, the United Kingdom Institute for Conservation and Society of Archivists jointly devised PACR to assess conservators' competence across a range of specialities, to establish and maintain standards within them. The Society's Accreditation Sub-committee was formed to implement this system within its membership for archive conservators. It supports compulsory CPD and the CPD review provides evidence for ongoing accreditation, showing that the candidate brings forethought and professional commitment to their work. CPD adds a three-dimensional view of the conservator's abilities in the context of that person's career, enabling the Society to help clients and employers find conservators with appropriate skills to preserve the archives in their care. For more information about the scheme view [www.nccr.org.uk](http://www.nccr.org.uk).

### **Registration sub-committee**

Part of the Society's commitment to CPD is to run a scheme for newly qualified archive professionals to 'register' their progress and development in the first years of their career – the Registration Scheme. It supports CPD by:

- Providing a formal framework for recording and monitoring training and development activities
- Encouraging archive professionals to think about CPD in four development areas – formal training courses, private study/research, work achievements and contribution to the archive professions
- Recognition of the development of archive professionals by candidates' employers and professional colleagues
- The use of a referee/mentor to encourage individual candidates to draw on the experience of those of longer standing in the archive professions, and vice versa
- The involvement of senior members of the professions to further CPD themselves by taking a full part in the encouragement and development of those more recently qualified

### **Information and Communications Technology sub-committee (ICT)**

ICT offers some exciting new opportunities for archive professionals in terms of managing their holdings and making them accessible to users. The ICT sub-committee of the Society acts as a focus for information about developments and projects and passes this information on to the wider membership. Our committee members participate in a wide range of ICT related professional activities, for example in software user groups, national and international standards working parties and project management groups, and we endeavour to share this information as widely as we can. We also encourage CPD by managing *archives-nra* an electronic discussion list that enables members to share experiences and obtain advice from professional colleagues.

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