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Maintaining SFEDI Approval as a Business Support Professional through Continued Professional Development

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The SFEDI UK Directory

The SFEDI UK Directory is an open access searchable database of Business Support Professionals. Anyone who appears on the SFEDI UK Directory must have achieved a SFEDI Qualification or Endorsed Award related to a business support role and as such is SFEDI Approved. To remain on the SFEDI UK Directory Business Support Professionals must ensure they remain 'current' with developments in the business world through keeping up to date with developments and best practice, this can now be demonstrated via CPD. This independent quality assured approval is a clear kite mark of the competence of those who appear on the SFEDI UK Directory.

Overview

All Business Support Professionals (BSPs) who wish to retain 'Gold' status on the SFEDI Awards UK Directory are required to maintain appropriate levels of relevant CPD and review this with their SFEDI Centre every two years. This ensures that CPD has occurred and is being used to maintain the individual at an appropriate level of knowledge and experience as the 'Business World' and its practices evolve over time – thus giving a qualified independent seal of approval of the individual's continued competence. This process of SFEDI Approval (detailed below) replaces the previous activity of SFEDI reaccreditation with effect from January 2010.

SFEDI Approval

On successful completion and Accreditation against a SFEDI Endorsed Award (e.g. Business Adviser Award) or Qualification (e.g. Diploma in Business Support) candidates are entered onto the SFEDI Awards UK Directory of Business Support Professionals. The SFEDI UK Directory is an open access UK Database of individuals who have attained certification against the SFEDI standards (Award or Qualification) and thus demonstrated their competence against National Business Support Standards using a robust assessment process and are now 'SFEDI Approved'.

Individuals are listed on the directory as 'Gold' status for two years following initial Approval, indicating that they are compliant with SFEDI standards and are up to date with developments in the business support arena. To retain Approval after the two years BSPs are required to demonstrate that they have been actively undertaking and applying relevant learning to their professional practice during this time. This is monitored via an independent CPD Review by a SFEDI Centre where they will ensure CPD has met the SFEDI Approval requirements detailed below.

To retain SFEDI Approval on the SFEDI UK Directory BSPs must undertake CPD activity that:

- Is of a **significant** amount
- Is **relevant** to their initial accreditation(s)
- Is of an **appropriate/valid** nature
- Is **demonstrably applied** in their practice as a Business Support Professional

Significant Amount of CPD

This involves participating in CPD activity of at least 30 hours of learning per year and that this is auditable (e.g. notes from workshops, documents for knowledge updates, workbooks, work produced or learning materials). Learning hours do not need to be 'Guided Learning Hours' with supervision support, but do need to be 'Notional Learning Hours' (NLH) which include all aspects of the learning required to achieve approval, for example, self directed study and distance learning.

Relevant CPD

CPD activity undertaken needs to be in support of/related to the SFEDI Award or Qualification the BSP is listed as holding on the SFEDI UK Directory (e.g. someone holding the Business Mentor Award may have undertaken CPD around both business support and mentoring, whereas a Business Adviser Award holder would not be undertaking CPD around mentoring but may well have covered the same activity in business support)

To ensure an activity is relevant any learning undertaken should be easily mapped to the initial accreditation standards for that individual's Award/Qualification. If it is not easily mapped it may not be relevant CPD required to retain SFEDI Approval and thus not included in the required 30 hours. It is the BSP's responsibility to ensure CPD offered as maintaining SFEDI status is relevant to the initial Award or Qualification certificated.

Appropriate/Valid CPD

This is recognised Notional Learning activity that will develop and maintain BSPs knowledge in-line with the demands of their role. This may include:

- Attendance at workshops
- Coaching or Mentoring
- Attainment of relevant qualifications
- Appraisal/Performance review
- Personal reading and updates
- Organisation professional updates (any format)
- Personal study
- Reflective practice (e.g. peer review, personal review)

This is by no way an exhaustive list but should give a general indication of types of appropriate activity. Where clarification is required on whether a particular activity is appropriate then a SFEDI Centre should be consulted.

Demonstrably Applied CPD

Attendance at the right kind of workshop for the right amount of time will only move a participant's learning so far and for this to be of real benefit the participant needs to use or apply this learning in context as this is often where the 'real' learning takes place. This application of learning is then a clear indication of an individual's practice developing over time and ensures they are maintaining themselves as 'current' as a professional in the Business Support arena. This approach is applicable to all aspects of learning as well as workshops.

There are a number of ways this may be demonstrated to the SFEDI Centre including:

- A reflective statement indicating what was initially learnt why it was of relevance and how this learning has been applied (a template is available at Appendix 3).
- Documentation indicating where and how practice has changed as a result of CPD e.g. new procedures developed organisationally that impact on the individual and their practice (a brief summary indicating why and what improvements had been made by this new approach would help put this into context).
- Comments from another individual (e.g. line manager, customer) indicating that activity performed by the BSP has been of benefit and that this could readily be linked back to the individual's CPD activity. E.g. Customer feedback indicating that the process the BSP took them through has been of benefit to the customer, and that this process has been one recently learnt by the BSP at a workshop.
- Witness testimony of learning that has taken place and also how it has been used in the business setting.

SFEDI Centre CPD Review

A BSP listed on the SFEDI UK Directory will send in their CPD portfolio* for independent review by a SFEDI Assessor at any SFEDI Centre. This is usually done around 1 year and 9 months following initial attainment of SFEDI Approval and should be done no later than 2 years following initial Approval (SFEDI Centres of Excellence may decide to allow applications from BSPs up to 2 years and 3 months from initial Approval, however this is at the Centres discretion and should be in exceptional cases only).

*A CPD Portfolio will be made up of the following items

- A completed SFEDI CPD Review application form – listed here at Appendix 1
- A current Job Description
- A current CV
- CPD plan for the next period (1 to 2 years)
- CPD Overview sheet linked to evidence submitted – listed here at Appendix 2
- Supporting Evidence e.g.
 - Workshop notes
 - Reflective statements
 - Performance feedback

Fees for this service are determined by individual Centres of Excellence – SFEDI’s re-approval fee is a standard rate and will be indicated by the Centre or direct from SFEDI Awards as listed on the current price list (at Jan 2010 this is £50).

Outcome

On completion of a CPD Review by a SFEDI Centre the Centre will indicate if the CPD portfolio is/isn’t sufficient (where a portfolio is insufficient the Centre will indicate in what way and recommend remedial action). Where a successful portfolio review has taken place the SFEDI Centre will inform SFEDI Awards who will update the UK Directory and issue a Certificate/Card* for distribution to the individual via the SFEDI Centre. This will detail the nature of the SFEDI Award or Qualification and will be dated indicating start and expiry of Re-approval.

*It is SFEDI Awards intention to move to a Credit Card style of certification that can be held (and shown where necessary) in a wallet/purse for convenience.

Quality Assurance of CPD Portfolio Reviews

In reference to quality, SFEDI Centres of Excellence are required to view a CPD Review portfolio in the same manner as an original Award or Qualification portfolio. This is that the same percentage of the Centres CPD review portfolios are sampled and that the SFEDI National Moderator/External Verifier (EV) may also request to see a CPD portfolio submitted – as such Centres of Excellence are required to hold candidate CPD portfolios until an EV visit has occurred (unless that Centres holds Direct Claim Status).

However it is important to note that Centres can claim for SFEDI Approval - CPD Certification/Card immediately following a successful CPD Review and that the SFEDI UK Database will be updated immediately as well.

In instances where candidates CPD portfolios are quality sampled following certification and also found to be ‘insufficient’ the Internal and/or External Verifier will agree with the Assessor concerned the reasons for this with the intention of this ‘error’ not being repeated. However the individual BSP concerned will in no way be penalised for an error on behalf of an Assessor and will retain their CPD and SFEDI Approval status on the UK Directory. It is anticipated that this will be a very rare occurrence.

This robust approach ensures a high quality level of practice must be maintained to retain SFEDI Approval and status on the SFEDI UK Directory, thus offering real, independently monitored, quality assurance to all concerned.

Maintaining pace with Standards and Qualification development

Best practice, standards and qualifications move on as time goes by, indeed National Occupational Standards and Qualifications are often reviewed every 3 or 4 years. Often these developments are not huge but over time do 'evolve' the nature of the standard/qualification thus keeping it in line with the most recent research and best practice. When CPD activity is undertaken and evidenced as part of a Re-approval it should be against the most recent qualifications available (that are relevant to the original accreditation). SFEDI Centers should be able to guide learners in this area and point them toward the most up to date qualifications available and also indicate the expiry date (and thus review date) of qualifications learners are undertaking. If unsure Centres should check against the current qualifications available from SFEDI as these will have a start and finish date indicated. Where Endorsed Programme/Awards have been undertaken and are no longer available these will have been superseded by a relevant qualification.

CPD Process Overview

This process overview indicates activity, time line and example outputs of Business Support Professionals as they move from initial Accreditation and Approval to on-going CPD with a biennial Re-approval.

| Activity | Time line | Example Outputs |
|---|---|--|
| Initial attainment of Award or Qualification via a SFEDI Centre | 0 Yr and 0 months | Certification Completed portfolio |
| Various CPD activities | Continuous with a minimum of 30 hours/year | Learning resource materials Certification Personal Development Plan Organisation performance review Reflective statements Training log Relevant feedback Witness statements |
| Email prompt from SFEDI for re-approval | 1 yr 9 months | |
| Application for CPD review – sent to SFEDI Centre | Up to to 2 years following initial SFEDI Approval (up to 2 yrs 3 months in exceptional instances) | SFEDI CPD Review form SFEDI CPD Overview CPD Evidence portfolio |
| Updating of UK Directory Issue of SFEDI Certificate/Card | Usually within 2 weeks of update to SFEDI from The Centre | SFEDI Certificate/Card (issued) |
| Quality Assurance checks | Not more than 6 months following Approval | IV and EV reports |

Holders of more than one Award or Qualification

Where an individual holds multiple Awards or Qualifications they can, if they choose, undergo re-approval for all of these simultaneously. This can be done by re-approving for ALL their Awards/Qualifications held as soon as the first is due for re-approval. This will mean re-approving early for some Awards/Qualifications, however recognising economies here the fee for additional Awards/Qualifications is significantly reduced.

Managing significant periods of absence

Where an individual takes a significant period of absence from their business support role (e.g. maternity leave) which would then take them well over the 2 year period for re-approval we would anticipate that the individual plans for this and undertake re-approval early, prior to taking time off.

In these instances it is important to remember that it is the candidate's responsibility to maintain their CPD and undergo re-approval every two years to stay on the SFEDI Directory, in exceptional cases Centres may allow a 3 month overrun on this time frame. If a candidate is to take off a significant amount of time (e.g. a year on maternity leave) that takes them well over these time periods then the best option here would be to undergo re-approval prior to taking time off, so as to maintain themselves on the directory for a further 2 years. Where this is the case the candidate will have had a significant period away from the workplace and as such not have been undertaking on-going CPD, it would be the candidate's responsibility to make up for this through engaging in sufficient CPD (at least 60 hours for 2 years) to bring them up to speed on their return (in this particular case it would give them a year to catch up). This should then afford the required flexibility without undermining the integrity of the SFEDI Directory.

However we do recognise it may not always be possible to plan this and that situations can change rapidly and in these instances we ask you to contact SFEDI Awards for further guidance.

Appendix 1 CPD Review Application

| SFEDI Approval - CPD Review Application | |
|---|---|
| Name: | SFEDI No: |
| Initial Endorsed Award/Qualification certificated (as it appears on the certificate): | |
| Date of initial certification or last Re-approval (which ever was most recent): | |
| SFEDI Centre assessed by/re-approval conducted by: | |
| SFEDI Centre CPD Review requested from (if different from above): | |
| | |
| Documentation required with submission | Check list |
| Completed CPD Review Application (Appendix 1) | ✓ |
| Completed CPD Overview form (Appendix 2) | |
| Current Job Description (or overview of activity where self employed) | |
| CPD Plan for next period (1 to 2 years) | |
| Current CV | |
| Evidence Portfolio with Index list | |
| | |
| Signed: | Date: |
| SFEDI Centre/SFEDI Assessor use only | |
| Name of Assessor: | SFEDI Assessor number: |
| Assessor Signature: | Date of Review: |
| The content of this form has been checked and is accurate (tick): <input type="checkbox"/> | Outcome (tick): Sufficient <input type="checkbox"/> Insufficient <input type="checkbox"/> |
| Internally verified by: | Externally verified by: |
| Date: | Date: |

Appendix 2 CPD Overview

| Name: | | Date: | | | | |
|------------------------------|--|--|--|--|---------------------------|------------------------------|
| Date | Activity | Development | Application | Related evidence and portfolio index | Development hours claimed | Cumulative development hours |
| Date the activity took place | What type of development activity have you undertaken? It may be a course or an event or a work related task | Try to explain what you gained in one of these terms: <ul style="list-style-type: none"> • Skills: something you can now do • Knowledge: something you now know • Experience: something that reinforced what you know or understand or introduced you to something new | Where and how have you used the learning from this activity? | | | |
| E.G. 8/1/10 | In house workshop on 'Understanding and applying financial ratios' | I now understand how to use 8 key accounting ratios in P&L and Balance sheets. The ratios themselves are detailed in the workshop notes submitted. | I have used this when clients have asked me if I think there accounts are showing a good picture – I have shown them how to do basic analysis so they can measure themselves period on period. This is further detailed in the indexed evidence. | Client Action Plan - P 6 Workshop notes – P 4 | 3 | 3 |
| | | | | | | |

| Date | Activity | Development | Application | Evid'e | Hrs | Hrs |
|------|----------|-------------|-------------|--------|-----|-----|
| | | | | | | |
| | | | | | | |
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Appendix 3 Reflective Statement Template

| Reflective Statement | |
|---|--------------|
| Name: | Date: |
| Description of the Situation (what occurred and who was involved?) | |
| What you/others observed about your behaviour/how you handled the situation | |
| What did you learn from the experience? | |
| Do you need further Knowledge/Skill for the future? YES/NO (if yes what action can you now take) | |
| Would you do anything differently in the future? YES/NO (if yes describe what and how) | |