



THE INSTITUTE OF THE
MOTOR INDUSTRY

User Guide

The IMI Credit-Based System for CPD and Professional Register



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IMI Credit-Based System for CPD and Professional Register

Introduction

The IMI Credit-Based System for Continuing Professional Development (CPD) is a mechanism that enables IMI Professional Registrants to evaluate their CPD activity and give it a credit value. This is important as Professional Registrants will be required to enter evidence of CPD activity and its credit value to their personal on-line CPD management tool area on the IMI website. Therefore, being on the Professional Register is very different from being an IMI member. To note; IMI membership did have a voluntary CPD requirement prior to April 2011 which is now obsolete. To obtain a copy of the Professional Register Terms and Conditions please call the membership team on 01992 511521 or download a copy from www.motor.org.uk/membership/the-professional-register.html

By signing up to the Professional Register you are committing to achieve 90 CPD credits over a 3 year CPD cycle. The 90 credit target is **achievable by everyone** because it does not necessarily mean 90 hours of learning as the impact of learning is taken into account when claiming CPD credit. For example, for self-evaluated CPD, one hour of activity equates to one CPD credit but you can add up to 6 additional CPD credits if you can evidence changes in behaviour and/or working practice. Cost should not be a barrier either as you do not have to attend formal paid for courses to meet the requirement.

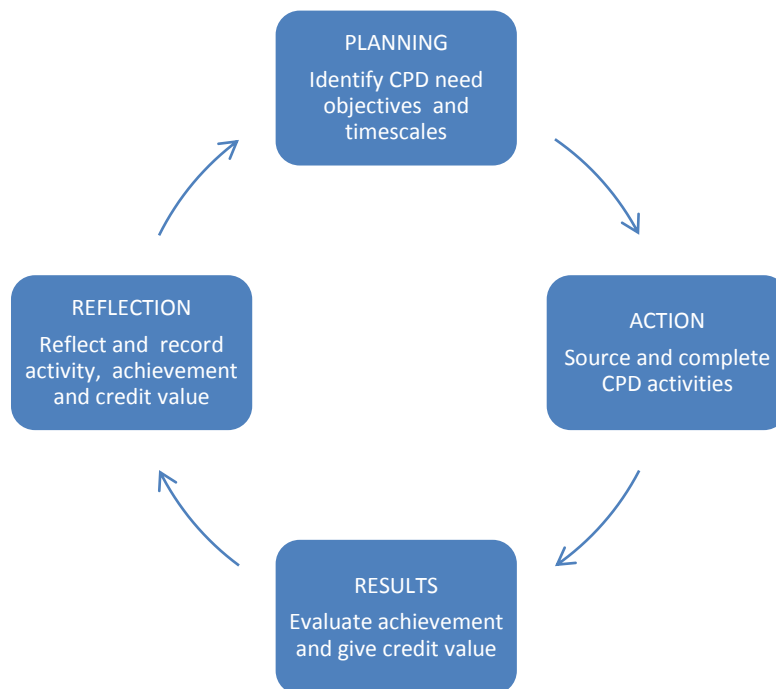
You can make your own decisions about the kinds of CPD activity that you do and the IMI's Credit-Based System for CPD and Professional Register gives you the flexibility to plan your own CPD in a way that suits your work, your learning needs, your preferences, and the time and resources available to you. Primarily however, CPD activity should be focused on making sure you are up-to-date, competent and effective in all areas of your work.

The on-line CPD management tool is only available to Professional Registrants and provides the opportunity to measure and reflect on the impact any CPD activity has had on your knowledge, behaviour and working practice specific to your job role and in the context of your working environment. Therefore a key aim is to give credit for CPD that can encompass the real value of the learning by identifying the impact it has had on you, and on your business/company/employer, and not just the time spent engaged in CPD activity. Also, the system aims to have impact on the sector by encouraging you to participate in CPD activity that meets skills priorities which is given a greater CPD credit value.

The IMI define CPD as a range of learning activities through which industry professionals maintain and develop themselves throughout their career. This is so they keep their skills and knowledge up-to-date enabling them to work effectively, and through the IMI code of conduct work ethically too. CPD can cover the whole spectrum of learning and can include on-the-job development, structured formally assessed training courses and qualifications through to more informal or unstructured opportunities such as reading technical journals and learning through experience.

The CPD Cycle and Process

Key stages of the CPD cycle and process can be seen in the diagram below.



Planning – Identify CPD need, objectives and timescales

Planning is very important and may require consideration of feedback following a company appraisal or discussion about work-related personal objectives with an employer. The professional should identify the need and plan the CPD activity utilising the on-line CPD management tool where CPD objectives can be set out in a Personal Development Plan (PDP) and recorded. Ideally, the CPD activity should be SMART (Specific, Measurable, Agreed, Relevant and Time-bound).

A key part of the planning process is to consider the potential impact of the CPD activity on knowledge, behaviour and working practice. This will ensure the maximum benefit and the maximum amount of CPD credit can be gained making the whole experience more worthwhile. It is important that a variety of learning opportunities are taken up and that the CPD activity gives its main focus to being up-to-date, maintaining competence and effectiveness in a given job role. Ideally, the professional should demonstrate a variety of learning that would encompass a blend of personal study, courses and interactive learning.

Action – Source and complete CPD activities

Once the CPD objectives have been agreed and recorded suitable CPD activity needs to be sourced and carried out. A good starting point is to visit the IMI CPD Gateway and also to take note of relevant training and development that is signposted within the professionals CPD management tool profile. The CPD activity may of course be sourced elsewhere, such as through an in-house company training programme or through reading or attendance at a relevant seminar or conference.

Results – Evaluate achievements and give credit value

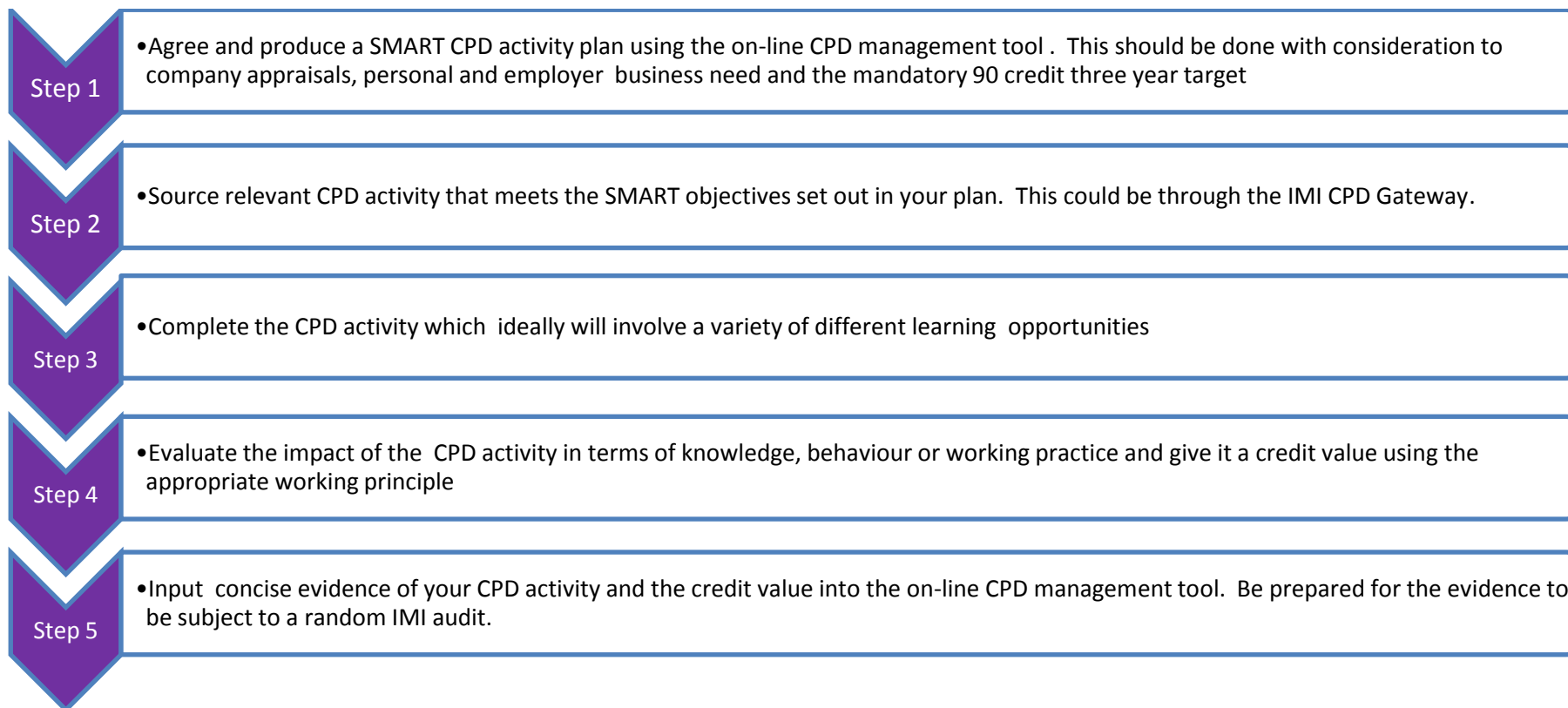
The professional must evaluate the experience and give a credit value based on the appropriate working principle as set out in this document above. Consideration must be given to whether the full impact of the CPD activity has been given a chance to take effect which will allow the professional to add extra credit for behavioural change or a change in working practice. Capturing an on-going record of personal development and its application in the workplace is an important point as it will help the professional make a successful self assessment of the impact of the CPD activity.

Reflection – Reflect and record activity, achievement and credit value

Utilising on-line CPD management tool the professional must submit and record evidence of the CPD activity when it is felt appropriate to do so. Written evidence in the form of a reflective statement must be submitted with certificates of attendance or achievement. Written evidence must be clear and concise in demonstrating relevance in terms of how the CPD activity has had impact on knowledge and, if applicable, behaviour or working practice. The evidence should also provide clear association to improvements in the professional's competence, currency of their new skills and/or knowledge and effectiveness in the workplace. It is recommended that the outcomes of CPD activity be used to inform the next planning stage in the CPD cycle.

CPD Process Flow Chart

The following flow chart sets out the Credit-Based System for CPD process in five key steps.

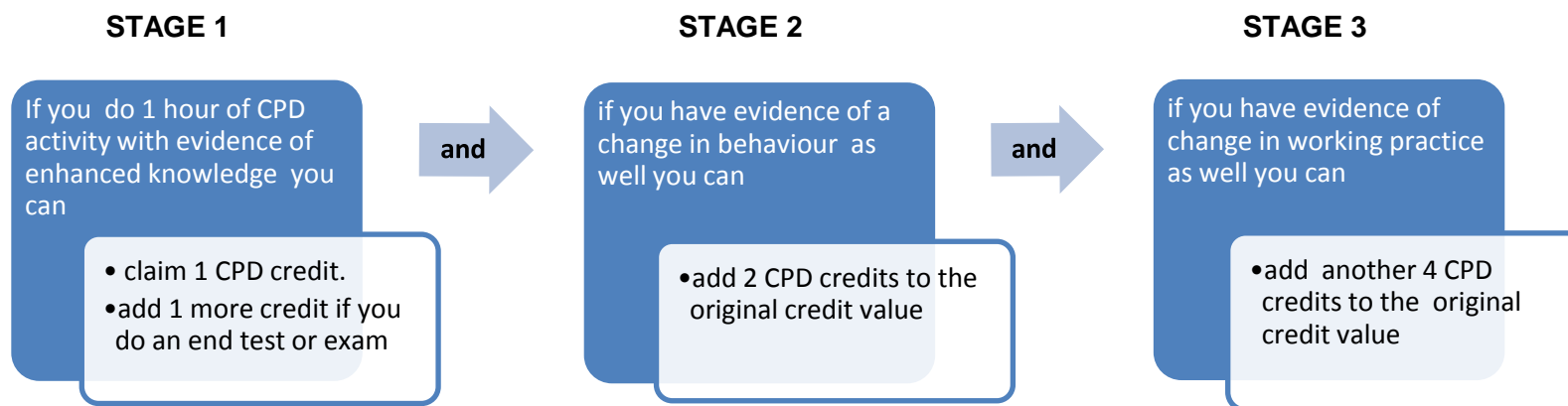


Calculating CPD Credit

Working Principle 1 – Personal CPD Activity

Working principle 1 is concerned with CPD activity that has been sourced outside of the IMI CPD Gateway, is not a nationally recognised qualification and does not have a pre-determined credit value (see working principle 2 for further information). This means that the professional will need to ‘self evaluate’ the credit value of the activity undertaken and must apply the following working principle. In its basic form one hour of CPD activity (learning) is equal to 1 CPD credit, i.e. where a professional can evidence new knowledge gained. However, this credit value can be built upon if there is evidence of impact on the professional’s behaviour and/or working practice. So, if the same hour of CPD activity is proven to have changed behaviour, i.e. they are doing something positively different an additional 2 credits can be claimed making the hour worth 3 CPD credits. If the same hour of CPD activity is proven to have changed working practice, e.g. the professional has implemented business improvements or efficiencies that improve profitability, an additional 4 credits can be claimed making the hour worth 7 CPD credits. Additionally, if the CPD activity has an end test or exam an additional 1 CPD credit can be claimed. So a very effective hour of CPD activity, with an end test or exam, can be worth a maximum of 8 CPD credits, i.e. 1 hour of activity plus an end test, plus evidence of impact on behaviour and working practice (Guiding examples can be seen on pages 10 to 12).

Important note: Credits need to be assigned to the evidence the professional enters into the on-line CPD management tool and will be subject to random audit by the IMI. This kind of activity fits into the ‘personal activity’ category in the on-line CPD management tool. The basic credit value at stage 1 below will vary depending on the number of hours of CPD activity undertaken. Stage 2 and 3 provide the opportunity to add extra credits if evidence is available. Only 1 credit can be added for an end test or exam regardless of the number of hours of CPD activity undertaken.

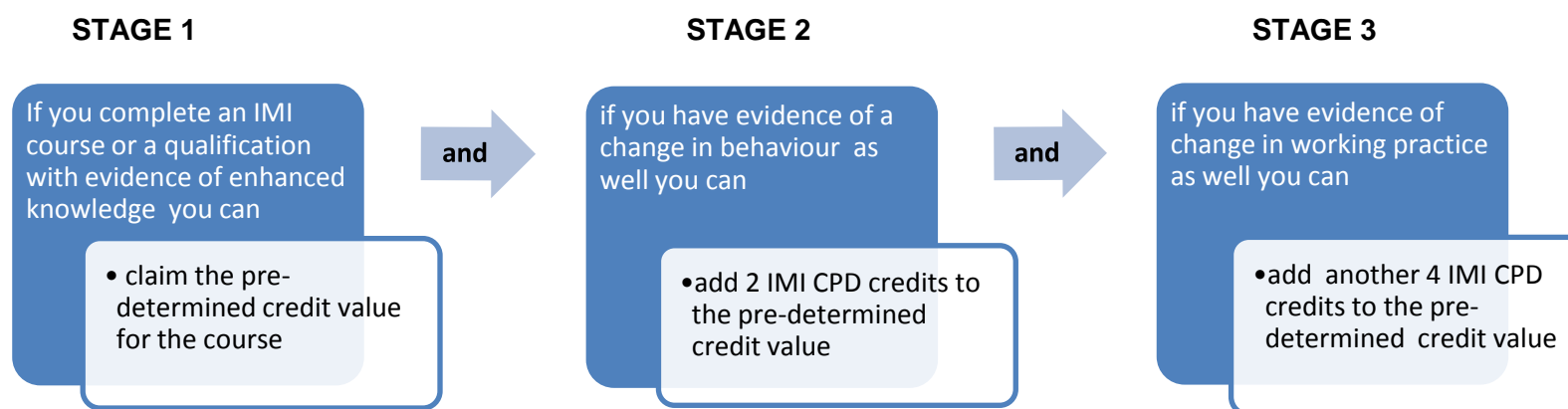


Working Principle 2 – IMI CPD Gateway and Nationally Recognised Qualifications – Shared CPD Activity

Working principle 2 is concerned with CPD courses that have been sourced through the IMI CPD Gateway which will have been given a pre-determined credit value by the IMI. Working principle 2 can also be applied to nationally recognised qualifications, e.g. those published to the Qualifications and Credit Framework (QCF) in England, the Scottish Credit and Qualifications Framework (SCQF) and the Credit and Qualifications Framework for Wales (CQFW). Nationally recognised qualifications have a 'credit value' which is based on notional learning hours. This figure can be taken and a zero added to give the credit value that can be claimed, e.g. QCF credit value of 72 equals 720 CPD credits.

If the professional can prove they have enhanced their knowledge of a subject they can claim the pre-determined number of credits, e.g. 10 CPD credits, for a 10 credit CPD course. In the same way as working principle 1 the professional can claim an additional 2 credits for behavioural change and another 4 credits for a change in working practice if the evidence is available. Therefore in this example, if the activity is proven to have changed behaviour and working practice an additional 6 credits can be claimed making the activity worth 16 CPD credits. Guiding examples can be seen on pages 10 to 12.

Important note: Credits must be assigned to the evidence the professional enters into the on-line CPD management tool and will be subject to random audit by the IMI. This kind of activity fits into the 'shared activity' category in the CPD management tool. The basic credit value at stage 1 below will vary depending on the course undertaken. Stage 2 and 3 provide the opportunity to add extra credits if evidence is available.



Credit Valuing Guiding Examples

The following guiding examples are designed to help the professional give a credit value to their CPD activity. The examples use the two working principles described in this document above on pages 8 and 9.

Using working principle 1:

- i. A Customer Service Advisor attends a 1 hour seminar on customer service skills and learns that 'how you communicate is usually more important than what you say', looking at body language, physical space and other verbal and non-verbal techniques. He/she then records this un-assessed CPD activity as having had an impact on their knowledge claiming 1 CPD credit against their CPD credit target.
- ii. A different Customer Service Advisor attends the same 1 hour seminar recording the same level of increased knowledge but he/she is also able to prove and record that the learning has had an impact on their behaviour, i.e. using their own body language to make customers feel more confident in the quality of service they are receiving. This enables them to add 2 credits making a total of 3 CPD credits that they can claim.
- iii. A third Customer Service Advisor attends the same 1 hour seminar, recording the same level of increased knowledge but he/she is able to prove that the learning has had an impact on their working practice, i.e. they have implemented a new customer focussed telephone answering process which has significantly improved customer experience. This enables them to add 4 credits making a total of 5 CPD credits that they can claim.
- iv. A fourth Customer Service Advisor attends the same 1 hour seminar, recording the same level of increased knowledge but he/she is able to prove that the learning has had an impact on their behaviour and working practice in a similar way to examples two and three above. This enables them to add 6 credits making a total of 7 CPD credits that they can claim.

Using working principle 1:

- i. A Dealer Principal reads a leadership skills article in a journal which takes 1.5 hours including writing down the key points that they have learnt, e.g. essential leadership skills are good communication, being articulate, thinking on your feet, humour, flexibility, integrity, compelling presence and empathy. He/she then records this un-assessed CPD activity as having had an impact on their knowledge claiming 1.5 CPD credits against their CPD credit target.
- ii. A different Dealer Principal reads the same article, taking the same time and records the same level of increased knowledge but he/she is also able to prove and record that the learning has had an impact on their behaviour, i.e. they have positively changed a rather un-flexible approach to dealing with employees to a very flexible one which has generated a good and more productive response. This enables them to add 2 credits making a total of 3.5 CPD credits that they can claim.

- iii. A third Dealer Principal reads the same article, taking the same time and records the same level of increased knowledge but he/she is also able to prove and record that the learning has had an impact on their working practice, i.e. they have implemented a new communication process that keeps employees fully informed of the business objectives and progress towards them. This has created a culture within the business where employees feel they have ownership and really understand how their role is important in taking the business forward. This enables them to add 4 credits making a total of 5.5 CPD credits that they can claim.
- iv. A fourth Dealer Principal reads the same article, taking the same time and records the same level of increased knowledge but he/she is able to prove that the learning has had an impact on their behaviour and working practice in a similar way to examples two and three above. This enables them to add 6 credits making a total of 7.5 CPD credits that they can claim.

Using working principle 2:

- i. A vehicle technician attends a 1 day (6 hour) vehicle manufacturer electric vehicle technical training course which has an assessment that requires a 75% pass mark. The course was accessed via the IMI CPD Gateway and has been given a CPD credit value of 10 by the IMI. The pass mark is met and he/she records the learning as having an impact on their knowledge, supported by a certificate of achievement as evidence, and claims 10 CPD credits against their CPD credit target.
- ii. A different vehicle technician attends the same 1 day course recording the same level of increased knowledge, supported by a certificate of achievement as evidence. However, he/she is also able to prove and record that the learning has had an impact on their behaviour, i.e. they are much more physically aware of the dangers of working on high voltage electric vehicles and now approach them in a very different way when carrying out maintenance tasks and schedules. This enables them to add 2 credits making a total of 12 CPD credits that they can claim.
- iii. A third vehicle technician attends the same 1 day course, recording the same level of increased knowledge again supported by a certificate of achievement as evidence but he/she is able to prove that the learning has had an impact on their working practice, i.e. they have taken the lead on implementing a safe working policy for high voltage electric vehicles which has a positive effect on everyone else in the workplace including customers. This enables them to add 4 credits making a total of 14 CPD credits that they can claim.
- iv. A fourth vehicle technician attends the same 1 day course, recording the same level of increased knowledge again supported by a certificate of achievement as evidence but he/she is able to prove that the learning has had an impact on their behaviour and working practice in a similar way to examples 2 and 3 above. This enables them to add 6 credits making a total of 16 CPD credits that they can claim.

Using working principle 2:

- i. A body repair technician completes a two year nationally recognised qualification (QCF Level 3 Diploma in Accident Repair MET Principles) which has a QCF credit value of 43. In line with working principle 2 a zero is added to the 43 making 430 credits. He/she records the learning as having an impact on their knowledge, supported by a certificate of achievement as evidence, and claims 430 CPD credits against their CPD credit target.

- ii. A different body repair technician completes the same course, recording the same level of increased knowledge, supported by a certificate of achievement as evidence. However, he/she is also able to prove and record that the learning has had an impact on their behaviour, i.e. they are able to take a much more confident approach to their work which results in less reliance on supervision. This enables them to add 2 credits making a total of 432 CPD credits that they can claim.
- iii. A third body repair technician completes the same course, recording the same level of increased knowledge, supported by a certificate of achievement as evidence, but he/she is able to prove that the learning has had an impact on their working practice, i.e. they have taken the lead on designing and implementing a 'lean' working process which improves workshop efficiency in terms of the time taken to remove and refit mechanical, electrical and trim components. This enables them to add 4 credits making a total of 434 CPD credits that they can claim.
- iv. A third body repair technician completes the same course, recording the same level of increased knowledge, supported by a certificate of achievement as evidence, but he/she is able to prove that the learning has had an impact on their behaviour and working practice in a similar way to examples 2 and 3 above. This enables them to add 6 credits making a total of 436 CPD credits that they can claim.

Important note: Considering the example above where a large qualification is undertaken it is recommended that the professional submits evidence at key stages of learning. This may be on a six monthly basis for example. This will enable the recording of their **continuing** professional development and will help them understand the impact the learning is having as they progress and meet yearly targets set against PDP objectives. Consideration will need to be given to the division of the total credit value across the qualification period, e.g. a two year qualification with evidence recorded at six monthly intervals may mean the credit value is divided into four equal amounts.

Note

The IMI aim to add to these guiding examples overtime

Support and Guidance

Support and guidance are available from the IMI if the professional finds themselves in challenging circumstances which may affect their ability to achieve target. These circumstances could include:

- Time commitment to family care where support is needed due to illness or other critical need
- Maternity leave
- Long term illness or hospitalization
- Unemployment or redundancy

If personal circumstances are felt to be significant enough to warrant additional support and guidance, the professional should contact the IMI and consideration will be given to their situation on a case by case basis. The IMI should be notified as soon as possible in such circumstances and no later than 6 months before the end of the current CPD period, however, if such challenging circumstances emerge in the last 6 months the professional should still contact the IMI to discuss their situation. The IMI will agree, in discussion with the professional, if such circumstances are valid and acceptable.

If there is a shortfall of CPD credit for reasons other than difficult or challenging circumstances that can be addressed within 3 months then an opportunity will be provided to access a 3 month grace period. The professional must notify the IMI of the shortfall and submit, at least 10 working days before the end of the CPD period in question, the reason for their shortfall along with an action plan which sets out how they will meet the target within the 3 months. This will be considered and agreed by the IMI before the grace period is granted. The IMI reserve the right to decide whether the reason for the shortfall is valid and acceptable.

If difficulty is found in locating relevant CPD activity, e.g. due to geographical location or specific CPD need then the professional should contact the IMI to see if they can help.

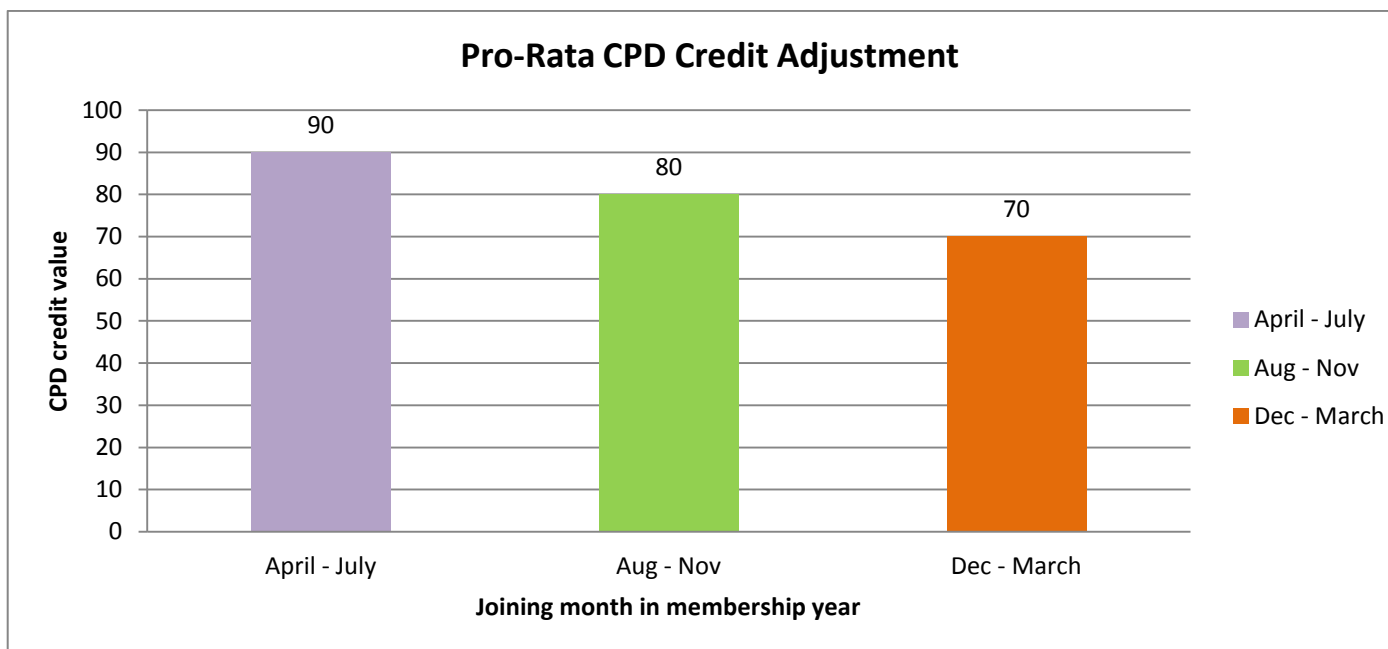
CPD Target Reminders

Email reminders will be sent throughout the 3 year period letting the professional know their progress in relation to their CPD credit target. Reminders will be sent at 6 monthly intervals until the final 6 months when a reminder will be sent every month. This should give the professional plenty of notice so that they can plan properly and meet the CPD credit target.

Important Considerations, Definitions and Conditions

Mid-CPD Cycle Sign Up - Pro-Rata CPD Credit Adjustment

The membership calendar year starts in April and ends in March. The point in the membership calendar year that an individual signs up to the Professional Register will determine the amount of CPD credits they are required to achieve over their 3 year CPD cycle. As the following graph illustrates, 90 CPD credits are reduced by 10 credits at two key-stages. If signing up to the Professional Register between April and the end of July the full 90 CPD credits must be achieved. Entry between August and November requires 80 credits and between December and March requires 70 credits.



IMI Definition – Un-assessed CPD Activity

Un-assessed CPD activity is defined by the fact that it **may or may not have set learning objectives and outcomes and is not formally assessed** by an end test or exam. For example this could be reading a technical article, a book on the subject area of business performance, attending a seminar, conference or an un-assessed internal company training course.

IMI Definition - Assessed CPD Activity

Assessed CPD activity is defined by the fact that it **does have set learning objectives and outcomes and is formally assessed** using, for example, an end test, summative exam or interim/periodic theoretical or practical testing. This could be an assessed CPD activity sourced through the IMI CPD Gateway or a nationally recognised qualification, i.e. those published to the Qualifications and Credit Framework (QCF) in England, the Scottish Credit and Qualifications Framework (SCQF) and the Credit and Qualifications Framework for Wales (CQFW). It could also be higher level qualifications delivered, assessed and awarded by universities. Assessment may be of the on-line, written, multi-choice, assignment based, verbal questioning or work-based project type.

IMI Definition - Impact on Knowledge

Impact on knowledge is defined by the fact that the learning experience has enabled the professional to become familiar with or have awareness of, or a clear understanding of specific information about a subject or something in the context of their job role and working environment. For example, the professional will be able to recall relevant data or information, understand meanings, facts or principles, understand how the knowledge can be applied to new situations in the workplace and how it has built on an existing knowledge of a subject.

IMI Definition - Impact on Behaviour

Impact on behaviour is defined by the fact that the professional can apply the knowledge gained to change the ways in which they do things within the context of their job role and working environment, i.e. they are doing something positively different. This could be a change in behaviour towards managing people. For example, being far more considerate to the ways in which people like to manage workload which can be very different and if allowed can provide a more productive output.

IMI Definition - Impact on Working Practice

Impact on working practice is defined by the fact that the professional can apply the knowledge gained and behavioural change to implement a tangible change to their working practice within the context of their job role and working environment. For example, the professional could utilise the learning to implement a business improvement or efficiency that impacts on profitability, such as a new marketing approach to improve the sales of vehicle parts to 'passing trade' customers.

Recommendation for Un-assessed and Assessed CPD Activity

To enable the maximum amount of flexibility and opportunity for the professional to achieve the target amount of credit the IMI is adopting a non-prescriptive approach to how much CPD activity has to be assessed or un-assessed. However, it is recommended that the maximum amount of un-assessed CPD activity is 80% of the target amount, i.e. 24 CPD credits per year or 72 CPD credits over the three year period and at least 20% assessed CPD activity i.e. 6 CPD credits per year or 18 CPD credits over the three year period, being approximately equal to one days training per year. A greater percentage, or indeed all, of the target amount of credit could be evidenced against assessed CPD activity if the opportunity exists and the professional feels this is more valuable to their personal development and to meeting their PDP objectives.

Recommendation for CPD Activity Planning

The CPD target is *approximately* 12 days of CPD activity without taking into account additional impact credits. It is highly recommended that the target is met by achieving 30 credits per year which is equal to *approximately* 4 days of CPD activity per year. This will avoid a backlog towards the end of the registration period and help to spread any cost and time away from the workplace within any one year. It is also more appropriate for **continuing** professional development as there will not be long time periods where no CPD activity is undertaken.

CPD Activity Restrictions - Reading

As described in the introduction a professional can make their own decisions about the kinds of CPD activity that they do. However, there is one restriction that must be borne in mind as follows; a maximum of 20% of the target amount of CPD credit can be claimed against reading books, journals, articles, web pages etc. This amounts to 6 CPD credits per year or 18 IMI CPD credits over the three year period.

Evidence Audit

CPD activity evidence entered onto the on-line CPD management tool will be subject to audit by the IMI on a random sampling basis throughout the 3 year cycle and on an end of cycle basis. This is to check the quality of the evidence, to make sure it is valid and has the right credit value and to see where any support may be required. During the audit process, credit values may be altered by the IMI. These alterations may lower or higher the credit value and the IMI's decision of appropriate credit value will be final.

Contact Detail Changes and Email Accounts

The IMI **must** be notified of any changes in contact details. This is particularly important where email addresses are concerned as CPD target reminders will be sent out in this format. Ideally an email account is required for the latter reason. However, if an email account is not available the IMI must be informed at the start of the CPD cycle. IMI members can update their contact details on-line if they have a 'My Profile' account.

Important Note for Large Qualifications

In the instance where a large qualification is undertaken it is recommended that the professional submits evidence at key stages of learning. This may be on a six monthly basis for example. This will enable the recording of their **continuing** professional development and will help them understand the impact the learning is having as they progress and meet yearly targets set against Personal Development Plan (PDP) objectives. Consideration will need to be given to the division of the total credit value across the qualification period, e.g. a two year qualification with evidence recorded at six monthly intervals may mean the pre-determined credit value is divided into four equal amounts. For example, a professional completes a two year nationally recognised qualification which has a QCF credit value of 40. In line with working principle 2 a zero is added to the 40 making 400 CPD credits. This could be divided into 100 CPD credits for each six months of learning and entered onto the on-line CPD management tool with appropriate evidence.

Types of CPD Activity Listing

Examples of recognised CPD activity types are listed below. To note, this list is not exhaustive and other types of CPD activity can be considered and submitted as evidence by the professional.

<p>Nationally recognised qualifications:</p> <ul style="list-style-type: none"> • Vocationally Related Qualification (VRQ) • National Vocational Qualification (NVQ) • Scottish Vocational Qualification (SVQ) • Vocational Competence Qualification (VCQ) • National Certificates • Higher National Certificates • Higher National Diplomas <p>University awarded qualifications:</p> <ul style="list-style-type: none"> • Diplomas • Foundation Degrees • Undergraduate Degrees • Honours Degrees • Post Graduate Degrees • Doctorates 	<p>E-learning</p> <p>Open and distance learning</p> <p>Vehicle manufacturer's courses</p> <p>Component manufacturer courses</p> <p>Update courses – technical, compliance, managerial etc</p> <p>Study visits</p> <p>Seminars</p> <p>Workshops</p> <p>Conferences</p> <p>Demonstrations</p> <p>Reading</p>
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<p>Accreditation schemes (ATA and AMA)</p> <p>E-learning</p> <p>Open and distance learning</p> <p>Vehicle manufacturer's courses</p> <p>Component manufacturer courses</p> <p>Update courses – technical, compliance, managerial etc</p>	<p>Briefings</p> <p>Business development/improvement</p> <p>Expert working groups/consultations</p> <p>Meetings</p> <p>Presentations</p> <p>Policy development/improvement</p> <p>Reflective learning</p> <p>Research</p> <p>Writing articles</p> <p>Peer review</p> <p>Critical incident analysis and rectification</p> <p>Secondments</p> <p>Consulting</p>
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Note

The IMI aim to improve and add to this listing overtime