



Professional Development Programme

A framework for QFD
including
Developing Management Skills



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PDP 2002-2003

A Framework for CPD
including
Developing Managerial Skills

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Foreword

Billy Bonar, PDP Senior Coordinator

The remit for this strand of the 2002-03 Professional Development Programme (PDP) was, *Implementation of Currie: What should an appropriate CPD framework for educational psychologists look like and how might training in management skills be included?*

Of Course “Implementaton of Currie” refers to the impetus towards implementation of the *Review of Provision of Educational Psychology Services in Scotland (SEED, 2002)*, more popularly known as the *Currie Report*. Specifically, the remit was focused on the section of the report entitled “Continuing Professional Development” within chapter 3, “The Training of Educational Psychologists”. This section comprises paragraphs 3.29 through 3.34 and recommendations 9, 10 and 11. Of these, recommendations 9 and 10 seemed to the group members to be most pertinent to the given remit.

Recommendation 9

A framework for the continuing professional development of psychologists should be developed, similar in principal to the CPD framework being developed for teachers in Scotland. Consideration should be given to accreditation of the framework by the BPS.

Recommendation 10

Each psychologist should have an individual CPD plan derived from the council’s local improvement plan, the service development plan, the outcomes of staff review and the individual’s career aspirations.

The group members took the view that the remit charged the group with laying the foundations of a framework for CPD, which could then be elaborated by both national managerial and professional bodies and, at the local level, by individual psychological services.

In *Educational Psychology: A Continuous Professional Development and Management Training Framework*, John Proctor proposes the concept of “the learning organisation” (Senge, 1990) as the key paradigm for psychological services. In a learning organisation, Proctor argues, Learning is “...a continuous process of professional development that determines not only career progression but also the direction and effectiveness of an

organisation". From the earliest stages of its discussions, the group recognised the complex nesting of contexts that must be accounted for by a CPD framework. Proctor's CPD Template provides a clear diagrammatic representation of the nesting system that determines any psychological service's CPD programme through both external and internal priorities and imperatives.

In conclusion, Proctor warns that failure to place CPD at the heart of practice will result in diminished influence at all levels for psychological services.

Carolyn Brown and Jean Kerr describe their work towards developing a CPD Audit Tool for psychological services in, *Developing a Continuing Professional Development Framework for Psychological Services in Scotland*. The Audit Tool was piloted with a range of psychological services and refined on the basis of the resulting feedback. Each service was provided with a summary of the definition and aims of CPD (as adopted by the group), examples of the range of activities that might comprise CPD, and a draft CPD audit tool for evaluation. This material, including the refined CPD Audit Tool and CPD Checklist, is printed here in *Appendices A, B and C*. The material is also available on the CD_ROM placed within this edition of the PDP Yellow Folder. It is intended that the electronic versions of the CPD Audit Tool and Checklist should be freely adaptable for use by Psychological services according to local needs.

Although Brown and Kerr report that the CPD Audit Tool was viewed by psychological services as an effective framework for identifying and planning services and individual CPD priorities, they caution that an integrated evaluative framework is also required if the process is to be both meaningful and credible. They argue that this must entail benchmarking between psychological services as well as scrutiny from outwith the profession.

They conclude by emphasising the necessary embedding of CPD policy development within integrated policies and procedures that match national and local priorities to the service development plan, match service priorities to staff training needs, and support the individual practitioner in enhancing personal and professional development.

Finally, in *Career Progression through Continuing Professional Development: Working towards A Management Training Framework*, Rick Walsh and Fergal Doherty have provided, in the form of a position paper, an extensive examination of what may be included in management training for educational psychologists. Their analysis usefully distinguishes between *management tasks* and *the management role*. This opens the way for an inclusive,

yet precise, working definition of *management* as those aims, tasks and actions involved in *support and supervision*. Thus *management*, in these terms, is seen as an integral function of most (if not all) post-probationary educational psychologists.

In providing a rationale for looking at the issue of management training, Walsh and Doherty make reference to a wide range of recommendations from the *Currie Report*. They focus on recommendations 18, 24 and 25 as being the most pertinent in this regard.

As well as examining the literature in this area, much of which is focused on the business world, Walsh and Doherty have also interviewed colleagues in related professions.

Walsh and Doherty conclude by offering a proposal for a management framework. They identify the key purpose of psychological service management as providing leadership and they delineate three main elements that, they argue, underpin the professional practice of service management. The inter-relationship of these elements (professional values, management functions and professional abilities) is summarised diagrammatically before being more fully explicated. They end with three recommendations aimed at taking forward this aspect of CPD. These include implementing CPD modular training in aspects of management; the suggestion that professional and managerial bodies look to adapt the *Scottish Qualification for Headship* for psychological services; and the suggestion that the framework of management responsibilities presented here provides the basis of a template for benchmarking between psychological services.

The work presented here is offered as an important contribution to the implementation of the *Currie Report* recommendations on CPD. It is anticipated that other working groups, under the joint auspices of ASPEP, SDEP and other managerial and professional bodies will take this work forward at a national level. It is also anticipated, however, that the work done by this PDP group will be of immediate value to psychological services at the local level.

A list of participants with contact details is provided at the end of this booklet. If further information is required, the relevant participant(s) should be contacted directly.

References

SEED (2002) Review of Provision of Educational Psychology Services in Scotland
Edinburgh: Scottish Executive

Senge P (1990) The Fifth Discipline: London: Random House

Educational Psychology: A Continuous Professional Development and Management Training Framework

John Proctor

Introduction

Educational Psychology is on the verge of the most influential yet challenging phase in its history. Societal change reflected by political and legislative initiatives is transforming the educational landscape of Scotland; and Educational Psychologists are uniquely positioned to make a major contribution to these national developments (Review of Provision of Educational Psychology Services in Scotland, 2002).

What is required if the profession is to grasp this opportunity? The concept of “the learning organisation” (Senge, 1990) is key. Learning organisations are not only better able to adapt to fast changing environments but are also better able to maximise their influence on these environments and to predict events before they happen.

How does one establish “a learning organisation”? Attitudinal shift is a key element; the members of an organisation seeing learning as central to their development and effectiveness. Learning is therefore not viewed as an adjunct to the job, a periodic amassing of skills and knowledge but as a continuous process of professional development that determines not only career progression but also the direction and effectiveness of an organisation.

The professional development of Educational Psychologists occurs at the graduate, post-graduate and in-service levels. An Honours degree in Psychology offers a broad coverage of psychological theory, research findings and methodology with an opportunity to specialise in chosen areas. Accredited Honours degree courses in Psychology courses are quality assured by the British Psychological Society.

Post-graduate training leading to eligibility for chartering as an Educational Psychologist by the British Psychological Society takes three years and comprises the successful completion of an MSc course in Educational Psychology and a probationary year in an Educational Psychological Service. University post-graduate courses and the probationary/induction programmes set up by individual Educational Psychological Services are formally accredited according to specific quality criteria laid down by the British Psychological Society. Through

course work and field placements, and the subsequent probationary period, trainees and probationer Psychologists are provided with a sound grounding in applied Educational Psychology. There are also increasing opportunities for Educational Psychologists to complete Doctoral degrees in Educational Psychology.

Following a probationary year in an accredited Service there is, however, no nationally accepted framework of minimal standards of quality for the continuous professional development (CPD) of Educational Psychologists in Scottish Educational Psychology Services. The annual Professional Development Programme (PDP) has played a leading role in promoting research by Scottish Educational Psychologists into a range of issues of national relevance. One drawback is that the PDP can be undertaken on an annual basis by only a relatively small number of Psychologists and is not consistently supported by all Educational Psychological Services. There is also some concern that its present format, whilst having served the profession well, is too narrow and in need of revision. Issues surrounding the PDP represents only one strand in the general view that there is a pressing demand for a nationally adopted CPD template or process, responsive to Scottish Services and Psychologists (yet flexible enough to cater for local needs) that can be undertaken by all Educational Psychologists. An example of such a template is outlined in Figure 1.

Figure 1

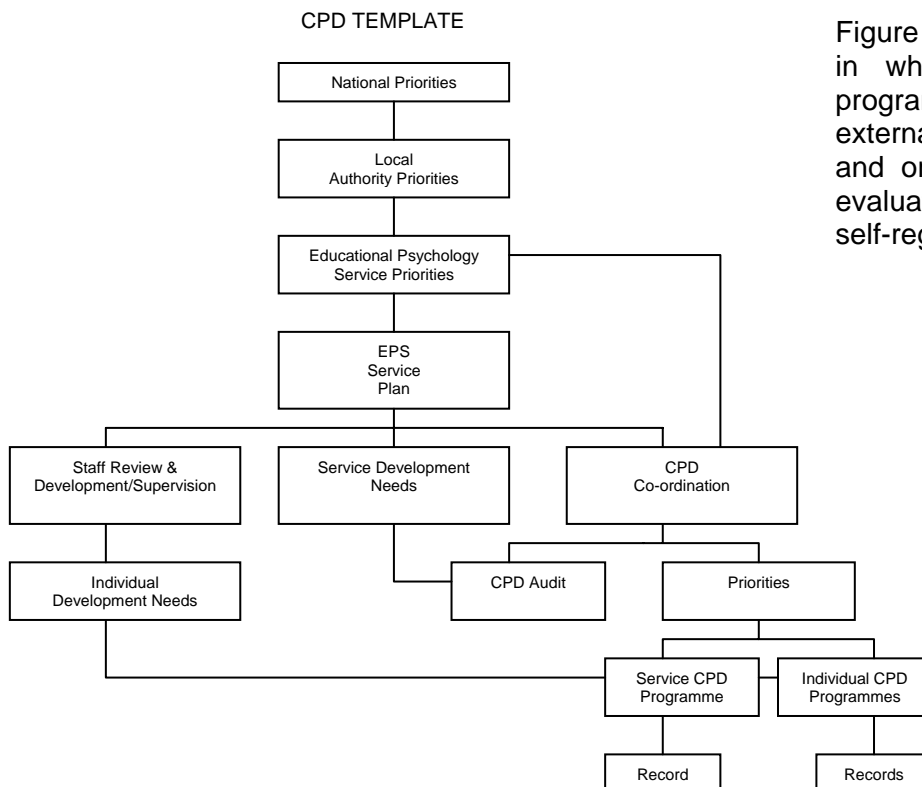


Figure 1 represents a system in which a Service's CPD programme is shaped by external and internal priorities and organised, delivered and evaluated through cyclical and self-regulating processes.

Management training of high quality is also necessary in the development of learning organisations. In Figure 1, CPD for managers in Educational Psychology Services should be determined at the Service Priority level, be included in the Service Plan and should follow the pathways outlined.

In meeting the challenges that lie ahead Scottish Educational Psychology Services will need to ensure that CPD lies at the heart of its practice. Failure to do so will result in the profession becoming increasingly marginalized in terms of its influence and relevance at local and national levels.

References

SEED (2002) Review of Provision of Educational Psychology Services in Scotland
Edinburgh: Scottish Executive

Senge P (1990) The Fifth Discipline: London: Random House

Developing a Continuing Professional Development Framework for Psychological Services in Scotland

Carolyn Brown and Jean Kerr

Introduction

Over the last decade there has been ongoing recognition of the need for psychological services to develop and establish systems and procedures to ensure appropriate developments within and between psychological services. Liddle's research *The Professional Development Programme in Context* (PDP, 1996) drew attention to the importance of developing a more universal and standardised approach for continuing professional development (CPD) for educational psychologists across Scotland. *Quality Assurance in Education Authority Psychological Services* (Mackay, 1999) highlighted that effective CPD is planned and matched to the needs of individuals, the psychological service and the local authority. Recognition of the need for quality assurance and consistency in CPD for educational psychologists resulted in the establishment of a National CPD Working Group. The CPD Working Group had a remit to develop a national framework for CPD for educational psychologists in Scotland. The group provided advice regarding CPD issues to the *Review of Provision of Educational Psychology Services in Scotland* (SEED, 2002) (*Currie Report*).

In response to the above context, a CPD Audit Tool has been developed to provide a means by which psychological services can assess their current arrangements for CPD and their future needs and priorities. It is designed to be in keeping with other national developments including: *How Good is Our School?* (HMI, 2001); *National Occupational Standards* (BPS, 2001); CPD developments for teachers following on from *A Teaching Profession for the 21st Century* (*The McCrone Report*). The question of developing a National Framework for CPD in terms of quality assurance and accreditation is also considered, along with an analysis of necessary management skills, to ensure the provision of effective CPD for educational psychologists across psychological services in Scotland.

The project team has, in consultation with the profession, sought to agree an understanding of CPD that defines it in the broadest sense as: *a range of tasks and experiences that contribute to the development and refinement of practice skills for an individual practitioner*. CPD is not viewed simply as attending conferences or reading research papers. CPD is understood as being diverse and dependent on the individual educational psychologist's

capacity for reflection and to receive critical feedback. In turn, the individual educational psychologist's development may contribute significantly to effective whole service delivery. CPD activities may include: providing training to others, personal reading, team/service meetings, whole service training days, research/project work, case work/work with schools, and input to local authority policy developments.

CPD is described as having the following features:

- it is matched to the needs of individuals, the service and the Authority
- it articulates with service, education and Authority policies
- it has a strategic function within a psychological service in terms of ensuring practitioner quality assurance
- it initiates, support and evaluates essential structures and processes within the service for providing CPD
- it facilitates access to professional development opportunities
- it supports participation, planning and monitoring
- it supports dissemination of individual's CPD products
- it ensures the service as a whole keeps informed of relevant current developments in psychology

Given the above conceptualisation, the following aims for CPD have been identified:

- it provides a strategic framework for a service of practitioner's skills and development needs
- it actively encourages research and development work
- it facilitates a mechanism to oversee, monitor and evaluate research and development
- it communicates research, innovative practice and development priorities in a clear and transparent way to the service and The Authority
- it encourages each practitioner to implement their CPD plan through supervision
- it provides an overview of trainee placements
- it encourages service networks to identify research areas
- it commissions service networks to undertake research projects
- it supports research and development projects carried out by the service within an agreed and regular timescale
- it develops mechanisms to record past research projects and future research priorities
- it actively encourages the ongoing nature of training and development of educational psychologists

For CPD activities to be provided in keeping with the features and aims described, management responsibilities are essential in establishing, maintaining and monitoring service structures, procedures and systems to facilitate a comprehensive CPD process within a service. A number of management tasks have been identified including:

- ensuring structures exist and are operationalized
- ensuring documentation has been developed and updated
- providing opportunities for staff to access a full range of CPD linked to individual's needs
- ensuring monitoring and evaluation processes are in place

Walsh and Doherty explore these tasks in more detail in their article on management training needs that follows.

Evaluation is self-evidently fundamental to any auditing process. Perspectives from services will be discussed in detail later in this article with a view to making recommendations, as part of a national strategy, regarding developments in quality assurance mechanisms and proposals for accreditation.

Developing a CPD Audit Tool

An audit tool was developed in order to assist psychological services in their self-evaluation of existing systems for CPD. The format is designed to facilitate of service documentation, structures, procedures, as well as development planning in these areas.

A pilot survey was undertaken in order to refine the audit tool and gain a perspective of service user's views. As structured questionnaire was sent to a sample of Services, selected in terms of size and demographic features (e.g. levels of deprivation, urban/rural, etc.). These Services were provided with a summary of the definition and aims of CPD, an indication of the range of activities that might comprise CPD, and a draft CPD audit tool for evaluation (se Appendices A and B).

The aims of the CPD audit tool are as follows:

- to provide a framework for services to identify established CPD practices within the service
- to provide a prompt to services regarding necessary structures and processes required for the comprehensive provision of CPD by a psychological service
- to provide a prompt to services regarding necessary documentation

- to provide a framework that facilitates service to identify CPD priorities within an appropriate timescale
- to provide a means by which services can evaluate their practice in terms of CPD provision

Summary of responses form services

Responses were received from eight services and collated. The first three questions related to the audit tool itself: whether it was a valid tool in terms of meeting its declared aims, whether the design/layout was appropriate for its intended purpose, and whether services thought it would be a useful addition to their CPD planning.

Evaluation of draft audit tool

Q1 Does the CPD Audit tool meet its aim?

All eight authorities thought that the audit tool was useful in providing a framework for services to examine their CPD practices in terms of policies, procedures and documentation. Where services were of the view that they already had quite extensive procedures in place, the audit tool was seen to serve as a quick checklist to ensure that there were no gaps in either policy statements/procedural guidelines or support documentation.

Q2 Are there any changes/additions that would be helpful?

A range of style preferences was highlighted in the feedback received. This included aspects of the layout of the grid, the descriptive terms used in column headings and the format style itself, with some preferring a prompt sheet or checklist style. A degree of repetition and overlap in some sections was identified. These differences, to some extent, again reflect the differing needs of Service, depending on the current level of development of their CPD systems.

The audit tool has therefore been revised on the basis of this feedback and a checklist option has also been prepared (see Appendix C). An electronic version of the audit tool is also available on CD-ROM accompanying the PDP Yellow Folder publication. This version can be copied and edited according to individual Service needs.

Q3 Will you use the CPD Audit Tool for future planning within your service?

There was general agreement that Services would benefit from the use of this type of audit tool for developing and reviewing their CPD systems. A majority of services thought that it was particularly helpful in planning 'next steps' towards developing and updating CPD

systems. Some Services indicate that in order to map onto their existing service structures, they would select specific aspects of the draft audit tool, thereby customising it for their own service needs.

The perspective of services on evaluation of CPD systems and procedures

Questions 4 and 5 in this survey dealt with the broader issues of evaluation of systems and national accreditation of services.

Q4 With reference to future planning for CPD, in what evaluation processes (eg benchmarking, review with Education Service Management etc) will your service be involved?

Responses to this question highlighted the range of within-service methodologies currently employed. These were under the umbrella of quality assurance systems and included Best Value initiatives and review through Development Planning processes. Individual self-evaluation of CPD effectiveness was also identified. The majority of services also indicated an intention to move towards benchmarking systems.

The need for a multi-strand approach to evaluation becomes clear, with evaluation taking place at the level of the individual psychologist in terms of his or her CPD priorities for personal and professional development and at the level of the service in terms of CPD systems development, management and review.

Q5 The National Review of Provision of Educational Psychology Services in Scotland (recommendation nine) suggests that a process for CPD accreditation of services on a national basis should be given consideration.

What is the view of your service regarding:

a) Who might be involved in this process? (Please specify eg internal representatives of the profession, external bodies etc)

There was a general feeling that for accreditation of psychological services to take place at a national level, the British Psychological Society (possibly through the Scottish Division of Educational Psychologists) would have a pivotal role. There were also suggestions that other national bodies such as ASPEP, HMIE, COSLA, ADES or trade unions could have an initial role to play in setting up the systems. However, a clear message was expressed that psychologists should manage any national structure.

b) What might be the key components of such a process?

Clear criteria for accreditation were seen as paramount. Parallels were drawn between the current accreditation systems for probationer induction, where criteria, timescales, documentation and review processes were clearly articulated and monitored through SDEP.

As well as such nationally based systems, the need for ongoing local self-evaluation was seen to play an important role in ensuring self-reflection and responsiveness to CPD. Thus quality assurance systems at a local level in relation to CPD, should link to broader national guidelines.

c) How might such a process be monitored?

Both qualitative and quantitative information was seen as necessary. For monitoring to be at its most effective, dynamic mechanisms would require to be built into the process from the outset that are responsive to both within and outwith service factors.

Discussion

There was a clear response from the profession that CPD for educational psychologists should be understood as a process embedded in day to day practice and refined by accessing a range of tasks and experiences which interface with psychological service and local authority priorities. The CPD Audit Tool was viewed by psychological services as an effective and useful framework for identifying and planning psychological service and individual CPD priorities. There may be significant overlap with a Service's Development Plan, the exact nature of which will depend on the local context. All of the Psychological Services responding indicated their intention to use some version of the CPD Audit Tool in future. On the basis of the feedback received, the CPD Audit Tool has been amended and additional checklists provided in order to allow for as much flexibility and ease of use as possible (see Appendices B and C).

The prospect of using the CPD Audit Tool for planning and task identification is laudable but requires the implementation of an evaluative framework for the process to be meaningful and credible. A practical and effective quality assurance framework is most likely to be located in some form of benchmarking process between psychological services which facilitates informed scrutiny from outwith the profession, for example, Education Service Management, HMIE and reference groups. Current national developments addressing the implementation of the *Currie Report* are clearly relevant. If the *Currie Report* recommendations regarding CPD are to be adequately implemented, there are clear implications for Psychological Service managers. Management will have a responsibility for shaping and targeting the

nature of CPD within services, and for ensuring CPD activities demonstrably impact on educational psychologist's skills and practice.

With regard to the development of an accreditation process, it is incumbent on Psychological Services that educational psychologist's practice is developed in keeping with local authority and national priorities. If a national body were established to carry out an accreditation function for CPD, it would follow that participants in such a forum have a remit for working collaboratively to meet national and local priorities. By this token, ASPEP, HMI, COSLA and ADES, as well as SDEP, would offer appropriate representation. The framework for operation for an accreditation body could include using some form of the CPD Audit Tool along with an evaluation framework.

Conclusions

The survey provided the opportunity for the participating Services to provide general comments or observations on the current issues in CPD and the draft audit tool itself. Respondents thought that the general overview of what constitutes CPD, its definition and aims, was helpful in providing a 'route map' for the development of CPD systems and structures.

The link between CPD and induction for probationers and trainees was raised on several occasions with complementary systems being identified as a logical step forward.

The need to ensure that CPD was integrated into broader systems of service development planning and annual staff review systems was stressed.

It was thought that use of the Audit Tool could be two-fold:

- To assist services in the early stages of developing a CPD policy, highlighting areas where explicit procedures and support documentation are required
- To provide a checklist for services where a comprehensive CPD policy already exists, helping these services to identify any gaps in their systems in terms of procedural statements or support documentation

Use of the Audit Tool can therefore provide a support framework for CPD to assist service management in the setting up of systems and structures.

It should be emphasised that a Service framework for CPD should have an in-built evaluation system. A multi-strand approach would appear to be most favoured by Psychological

Services. This should operate at the level of both the Service and the individual psychologist.

At the level of the individual psychologist, evaluation should promote self-reflection. This can be supported through systems such as the annual staff review and the use of a CPD log.

At the level of the Psychological Service itself, there is a need for integrated systems, policies and procedures that:

- match national and local priorities to the service development plan
- match service priorities to staff training needs
- support the individual psychologist in enhancing his or her personal and professional development

These systems also require to be dynamic and subject to regular review and update.

REFERENCES

British Psychological Society (2001) National Occupational Standards Leicester: BPS

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SEED (2002) Review of Provision of Educational Psychology Services in Scotland (The Currie Report) Edinburgh: Scottish Executive

Appendix A: Audit Tool for Developing a Psychological Service CPD Framework

1. Introduction

As stated in *Quality Assurance in Education Authority Psychological Services* (Mackay, 1999), effective CPD is planned and matched to the needs of individuals, the psychological service and the local authority. It should be closely linked to the Psychological Service's development plan, Service priorities, staff review processes, and the development needs of individual educational psychologists. It should articulate with other Local Education Authority Service Plans, e.g. Education Service Plan, Children's Service Plan and National Priorities.

The CPD Audit Tool has been developed in the context of:

- *Quality Assurance in Educational Psychological Services* (MacKay, 1999)
- *Review of Provision of Educational Psychology Services in Scotland (The Currie Report)* (SEED, 2002)
- *How Good is Our School?* (HMI, 2001)
- *A Teaching Profession for the 21st Century (The McCrone Report)* (SEED, 2001)
- *National Occupational Standards* (BPS, 2001)

2. Definition of CPD

The audit tool defines CPD in its broadest sense as a range of tasks and experiences that contribute to the development and refinement of practice skills for an individual practitioner and this in turn contributes to effective whole service delivery. In this sense, CPD within a psychological service is defined as having the following features:

- it is matched to the needs of individuals, the service and the Authority
- it articulates with service, education and Authority policies
- it has a strategic function within a psychological service in terms of ensuring practitioner quality assurance
- it initiates, supports, and evaluates essential structures and procedures within the service to provide CPD
- it facilitates access to professional development opportunities
- it supports participation, planning, monitoring and dissemination of individual's CPD
- it ensures the service as a whole keeps informed of relevant current developments in psychology

3. Aims of CPD

Facilitation and organisation of CPD within a service would include the following:

- it provides a strategic framework for a service to deal with practitioner's skills and development needs
- it actively encourages research and development work
- it facilitates a mechanism to oversee, monitor and evaluate research and development
- it communicates research, innovative practice and development priorities in a clear and transparent way to the service and the Authority
- it encourages each practitioner to implement his or her CPD plan through supervision
- it provides an overview of trainee placements
- it encourages service networks to identify research areas
- it commissions service networks to undertake research projects
- it supports research and development projects carried out by the service within an agreed and regular timescale
- it develops mechanisms to record past research and future research priorities
- it actively encourages the ongoing nature of training and development for educational psychologists

4. Range of activities that comprise CPD

It is important that a broad range of activities are recognised as contributing to the continuing professional development of a psychologist. This ensures that work undertaken by an individual or group of psychologists to extend his or her skills and knowledge is afforded the status of CPD. These activities could include:

- providing training to others
- personal reading
- team/service meetings/topic discussions/training days
- research/project work
- attending conferences
- attending training courses
- professional Doctorate or training modules
- reflection on and analysis of ongoing work with schools, parents and other professionals
- input to Authority policy developments and initiatives

5. Psychological Service management responsibilities for CPD

The Audit Tool assumes that psychological service management has key responsibilities for establishing CPD structures, procedures, policy development processes and the systems to monitor and evaluate a CPD service framework. It is not envisaged that service managers are necessarily responsible to carrying out all CPD framework tasks to ensure that they are done. Key management tasks include:

- to ensure structures are in place and operationalised
- to ensure documentation has been developed and updated
- to provide opportunities for staff to access a full range of CPD linked to individual's identified needs via supervision and management review
- to ensure monitoring and evaluation takes place
- to ensure evaluation of CPD activities on a regular basis including an annual report

6. Aims of the CPD Audit Tool

The aims of the CPD audit tool are as follows:

- to provide a framework for services to identify established CPD practices within the service
- to provide a prompt to services regarding necessary structures, processes required for comprehensive provision of CPD by a Psychological Service
- to provide a prompt to services regarding necessary documentation
- to provide a framework which facilitates service to identify CPD priorities within an appropriate timescale
- to provide a means by which services can evaluate their practice in terms of CPD provision

7. Evaluation

It is intended that the Audit Tool should be used by the service in the first instance to carry out their own self-evaluative CPD audit in a service-wide basis. It is recommended that psychological services develop processes for evaluation with a view to evolving a coherent CPD structure for psychologists on a national basis. Benchmarking between authority services would be one way of contributing to this process.

Appendix B: Psychological Service CPD Framework: Audit Tool

Policies and service documentation

The audit tool aims to provide a minimum specification for developing documentation to support a service CPD framework. All documentation should be reviewed and updated on a regular basis in keeping with local and national developments.

Policy Development Documentation	Description of Documentation available	Priority Development Tasks	Review Schedule (Tasks in progress, target dates, etc)	Outcomes/Next Steps
Statement of Service Aims				
Service Development Plan				
Service Policy and Procedural Guidelines				

Induction Policy (Accredited)				
Trainee Placement Policy				
Staff Supervision Policy				
CPD Policy				
CPD record keeping For Service and for Individual staff				

2 Service structures and procedures

The features identified below outline a service infrastructure aimed at achieving effective internal communication, planning of priorities and ongoing monitoring of service and individual needs. It aims to underline a collaborative and participative ethos within the service, which acknowledges individual skills and develops them further through such processes as supervision and task oriented working groups. Regular links to external bodies at authority and national level are considered essential for maintaining an awareness of ongoing developmental needs and skill levels required from the service and its individual workers.

Structures and Procedures	Systems in operation	Priority Development Tasks	Review Schedule (Tasks in progress, target dates etc)	Outcomes/Next Steps
CPD Steering Group/CPD Coordination				
Service Management Meetings				
Team Meetings				

Induction Procedures				
Trainee Procedures				
Supervision Procedures (including staff review)				
Links to educational Management				
Links to National Bodies				

3 Service processes

Such features are associated with attaining appropriate CPD and effective organisational management. It is essential that psychological service managers assume a key responsibility for ensuring the realisation of the processes identified. This is not to assume that service managers lead and deliver all processes but that they ensure that the processes are initiated, maintained and supported by those in the service with the relevant skills to do so.

Service Processes	How this is implemented	Priority Development Tasks	Review Schedule (Tasks in progress, target dates etc)	Outcomes/Next Steps
All staff actively participate in CPD planning				
Targets for CPD are set and prioritised				
Effective communication exists across the Service				

There are opportunities for staff to access National CPD Initiatives				
Research opportunities Are available to staff				
Staff can access experience in trainee Supervision				
Staff can access career breaks, sabbaticals or work exchange opportunities				

Appendix C: Psychological Service CPD Framework: Audit Checklist

The checklist is intended to provide an overview for services of their policies, documentation, and procedures relating to CPD. It allows a quick reference point for elements of CPD planning that require review or development. It can be used as a stand-alone item for services where it is felt that a comprehensive system is already in place but where a visual overview of the elements would be useful. Where a fuller working document is required to assist with more detailed planning and review, please refer to the Audit Tool.

1. Policies and Service Documentation	Yes-no action required	Yes- but in need of update or review	No- requires to be developed	No- but not required
Statement of Service Aims				
Service Development Plan				
Service Policy and Procedural Guidelines				
Induction Policy (Accredited)				
Trainee Placement Policy				
Staff Supervision Policy				
CPD Policy				
CPD record keeping for Service and for individual staff				

2. Service Structures and Procedures	Yes-no action required	Yes- but requires review	No- requires to be developed	No- but not required
CPD Steering Group/CPD Coordination				
Service Management Meetings				
Team Meetings				
Induction Procedures				
Trainee Procedures				
Supervision Procedures (including staff review)				
Links to educational management				
Links to National Bodies				

3. Service Processes	Yes-no action required	Yes- but requires review	No- requires to be developed	No- but not required
All staff actively participate in CPD planning				
Targets for CPD are set and prioritised				
Effective communication exists across the service				
There are opportunities for staff to access National CPD Initiatives				
Research opportunities are available to staff				
Staff can access experience in trainee supervision				
Staff can access career breaks, sabbaticals or work exchange opportunities				

Career Progression through Continuing Professional Development: Working Towards a Management Training Framework

Rick Walsh and Fergal Doherty

Abstract

As the second of the two PDP sub-groups concerned with the issues of Continuing Professional Development (CPD) and Management aspects of the *Review of Provision of Educational Psychology Services in Scotland (The Currie Report)* (SEED 2002), this sub-group aimed to look at the relevance of management training as a CPD path within the profession of Educational Psychology. Key publications were investigated in order to establish a rationale behind promotion of management training as a CPD/career path. The current situation within the profession of educational psychology was reviewed, as was that of selected *parallel professions*. Research and theory in the area of Management was applied in order to establish clear definitions and terminology pertinent to applied educational psychology. A distinction was drawn between *management tasks* and *the management role*. The appropriate stages of career progression that educational psychologists might normally expect to be involved in these distinct aspects of management were identified. The general view of the PDP group was that all educational psychologists (EPs) at all stages of their career, but usually post chartering, should be eligible to participate in management training activities or courses in order to furnish them with skills necessary for pursuit of that career goal. In terms of those psychologists wishing to follow a career path which would ultimately lead to promoted posts and assuming more of the 'management role', the PDP group has produced a possible framework, based on the *Scottish Qualification in Headship* (SEED, 2001), which identifies the key indicators of *quality management*. A summary of findings and recommendations for future consideration is offered.

Aim

To produce a *position paper* in order to promote further discussion on the topic of Management Training as a CPD opportunity/pathway for EPs.

Introduction

This PDP group was set up to look at issues relating to the implementation of the *Currie Report* with regard to the key issues of CPD and Management training. The key question was: *How might training in management skills be incorporated into an appropriate CPD Framework?*

Why Look at the Issue of Management?

In seeking to establish a legitimate rationale for looking at the issue of management within Psychological Services, one need look no further than the recent Scottish Executive publication *Review of Provision of Educational Psychological Services in Scotland, 2002*, more widely recognised as the *Currie Report*. This document made a number of recommendations pertaining to CPD, Psychological Service Management and Quality Assurance.

...there is a need for dissemination of good practice in the whole area of management, leadership and quality assurance. There is also a need for a more formal framework to encourage effective self evaluation, including peer evaluation...

(Currie, 2002)

In relation to the *Currie Report* there are a number of recommendations, which either directly or indirectly, have significant implications in terms of management training for educational psychologists. Recommendations 10, 17, 18, 20, 24 and 25 all contain advice which directly relate to CPD issues, structures and frameworks and the way in which Psychological services and individual EPs are managed, reviewed and evaluated. While all of these recommendations have related implications for the role of *managers* within Psychological Services, we will be focusing on those recommendations with particular relevance to the development of improved practice in the areas of management and leadership within the field of applied educational psychology. In this sense the most pertinent recommendations appear to be 18, 24 and 25 respectively.

Recommendation 18

...Good practice in the area of management, leadership and quality assurance should be identified and disseminated, and management courses, for principal psychologists and those progressing to this position, should be supported by local authorities...

(Ibid)

This recommendation recognises the necessity for the profession to reflect on what constitutes good practice in the area of management and leadership and to provide training opportunities which will promote that knowledge throughout the profession. The CPD framework appears to be the most appropriate route through which to further these aims as this will enable inward reflection and audit of current good practice within services as well as identification of areas for development. It will also be responsive at the level of both the service and individual EP.

Recommendation 24

...each local authority educational psychology service should be led by a principal psychologist with a clear delegated authority, including budget, within the development of devolved management arrangements for the educational psychology service...

(Ibid)

This reinforces the view that where a management role is deemed to be necessary that it is most appropriate that this be carried out by a suitably trained, qualified and experienced educational psychologist. This recommendation therefore would appear to back up the general view that EPs require to be managed by those who have previously been, or continue to be, educational psychologists. While this is an entirely reasonable expectation, it entails ramifications in terms of training and appropriate skills acquisition. That is to say that there will be a need to ensure that those promoted from within the field of educational psychology to positions whereby their role changes significantly are given sufficient training and skills in order to be able to carry out that role effectively.

Recommendation 25

...career progression within educational psychology should be considered further and should take account of staff review procedures, continuing professional development and job-sizing...

(Ibid)

This recommendation can be viewed in terms of the need to rationalise and clarify such issues as the identification of *who does what* at each stage of progression through the profession. This is particularly relevant when considering the topic of management, as it is described in detail later in this article, as there will be an increasing need to establish clearly not only those differing roles and functions which may be covered by the *catch-all* term of

management, but also at which stages of an individual's career he/she may be expected to perform these roles. It is hoped that these issues will be teased out during the impending job-sizing discussions.

The fact that a significant number of the recommendations arising from the *Currie Report* have either direct or indirect implications for CPD and management training issues is a testament to the degree of import that this area currently carries within the profession. The importance of management and leadership issues is also given considerable weight if we consider another recent key publication, which in no small part served to inform the *Currie Review*. The document: *Quality Assurance in Education Authority Psychological Services: Self-Evaluation Using Performance Indicators* (Mackay, 1999) identified desirable indicators in relation to management, leadership and quality assurance.

Leadership of service managers

...service managers demonstrate a high level of professional competence and leadership and a strong commitment to high standards. They create confidence and inspire others, promote and represent the service effectively...are approachable, helpful and impartial with all staff...have an accurate picture of the demands placed on staff and of the tasks they are expected to perform. They are able to communicate effectively and to handle confrontation skilfully...

(Mackay, 1999)

Work of promoted staff

Promoted staff have clearly defined and understood remits which meet the needs of the service. They form an effective team and work well in supporting staff in a team approach. They offer an effective combination of support and appropriate challenge to colleagues. They ensure that their own remits and the duties of those for whom they have responsibility are undertaken efficiently and effectively.

(Ibid)

It would appear then that the various issues surrounding the topic of management and leadership within the profession of educational psychology have in the past and continue at present to be of considerable interest to those working within this field.

Why Management Training?

No one would reasonably suggest that those currently employed, as service managers or operating in promoted posts, with management responsibilities, within the profession of educational psychology are in any way inappropriately trained or unskilled. Awareness of and training in specific management skills, however, can only serve to improve practice in this area.

...above all the leader/manager must increase his or her diagnostic skills and personal flexibility in order to fulfil whatever leadership functions are most needed in any given situation...

(Schein, 1988)

A highly skilled leader or manager can have a significant and positive impact upon wider service delivery and practice:

...the ability of management to coordinate employee, group and departmental efforts – all enter into organisational effectiveness...

(Ibid)

It is widely accepted that everyone within a psychological service should have access to appropriate opportunities and that there should be clear and explicit procedures and structures in place to allow this to happen. In this sense, managers or those seeking to progress towards management positions should be viewed no differently.

...employees (including managers) may become alienated, insecure, and bitter if the organisation fails to fulfil minimum needs for security, maintenance of self-esteem, and opportunities to grow and develop...

(Ibid)

What is management? Terms and Definitions

In seeking to establish an argument towards the need for improved CPD and training opportunities for managers within psychological services, and those wishing to progress towards these positions, it would first prove useful to establish exactly what is meant when we use the term *manager*.

It is the view of this PDP group that when looking at the area of what constitutes a manager that we should view this role in a wider dimension than that traditionally identified. In our view, a manager should be a facilitator of quality work practices within psychological services,

a conduit for knowledge and skills training, an implementer of innovative practices, an effective motivator and a consistent support to colleagues. It may prove useful, therefore, to view *management* more in terms of *support and supervision*. The skills and abilities of managers should be applicable whatever the organisational structure of a particular psychological service. That is to say, when we are attempting to identify what constitutes a manager, we should not be confined by traditional hierarchical theories of management whereby a manager is seen to be a *super-ordinate* with all the professional skills, knowledge and wisdom, and who has the power or control over those deemed to be *subordinate*. Instead management should be viewed in terms of the more contemporary theory of *total quality management* whereby everyone, regardless of formal status or experience, is seen as a valuable contributor to, or stakeholder in, the service, whose contributions may be augmented or facilitated by the skills of those designated as *managers* (Reid and Barrington, 1997).

There is an extensive literature available on management theory, skills and strategies, albeit targeted predominantly at the corporate world. Nonetheless the basic principles appear relevant and transferable to the educational psychology context. Some common themes evident in the literature include:

- support and supervision
- counselling and empathy
- knowledge of practice/professional competence
- leadership
- decision making
- time, stress and anger management
- management of budgets and finances/cpd etc
- managing work relationships – professional issues/employment law/grievance & disciplinary procedures
- managing performance – appraisal systems, annual review and development etc

The list generated above is reminiscent of the key features of leadership as outlined in the *Quality Assurance* document (Mackay, op.cit), which proposed the following as displaying evidence of effective leadership:

- a high level of professional competence
- the ability to create confidence and inspire others and to promote and represent the service
- awareness of and participation in local and national developments

- approachable, helpful and impartial with all staff
- aware of the demands on staff and the tasks they are expected to perform
- effective communication
- skill in handling confrontation
- a central role in promoting a positive ethos and in fostering teamwork throughout the service
- staff encouraged to develop initiative and leadership in relation to their work
- establishment of core values and priorities and supporting effective practice within agreed standards

There exists already a wealth of quality research, expertise and information from the Human Resource professions such as the Chartered Institute of Personnel and Development (CIPD), geared specifically towards identifying and research quality and effective management practices. This in turn informs a wide range of management training courses covering a variety of topics. An Internet trawl of potential courses available from the CIPD on management produced an extensive return. A brief selection of courses offered included:

- an introduction to management
- an introduction to supervision
- practical leadership skills
- managing learning and development
- time and self management
- powerful motivation strategies
- managing at a distance
- creating a learning and development strategy
- the creative manager – accelerated creative thinking for managers
- the psychology of leadership, and
- the psychology of managing work relationships

Proof, if it were needed, that the corporate, business, personnel and human resource professions have a well-established framework for, and commitment to, management training. Perhaps this suggests that the profession of educational psychology still has some way to go in considering the importance of adopting a strategic approach to effective management practices within the work environment.

Commentators from the corporate world would suggest that the extensive list of common themes reported on page 38 could be distilled into four core areas that describe the role of a

manager in any given system (Heller *et al*, 2002). The role of the Manager, according to Heller *et al*, is identified through the following core elements:

- communication
- managing people
- problem-solving and decision-making
- change and innovation

Communication

...effective communication is the essence of leadership and management. It is neither top-down nor bottom-up, but two-way and continuous...there is a huge range of channels of communication available, along with a variety of techniques and means...all good management depends on successful personal relationships...good communication of any kind always aims to meet the needs of all parties...a good communicator needs some of the chameleon-like qualities of the good actor, and, like actors, managers need both training and practice...

(Ibid)

This is not to suggest that those currently occupying promoted or managerial positions within psychological services are not effective communicators. On the contrary, as effective communication is an essential and integral part of the job of an EP, it is the case that this pre-requisite skill is already possessed by most psychological service managers. The suggestion here, however, is that individuals can improve upon existing skills through access to training and through the recognition and practice of these core aptitudes and abilities.

Managing people

...managing people is about organising and motivating individuals to work together to achieve certain goals. Managers must understand people's needs and behaviour to become effective leaders who can inspire and develop team members...

(Clemenson *in* Heller *et al*, 2002)

Again the skills necessary to be an effective EP appear to have a lot in common with those skills described as being important for effective management. Understanding people's needs and behaviour and using that insight to promote better performance and effectiveness is something that will be familiar to all EPs. The challenge comes in transferring these skills to the context of working with other colleagues within the profession, whether that is through a managerial position or through support and supervision of colleagues.

Problem-solving and decision-making

“...a manager...will spend much of [their] time dealing with problems and making decisions...”

(Pinnington *in* Heller et al, 2002)

Problem-solving and decision-making are fluid and interlinked processes which will be familiar to most EPs. They involve:

- consulting – involving all colleagues who may be affected, asking others for their opinions
- analysis – breaking down an issue into its component parts
- review – listing possible answers and ensuring each item is clear, asking questions in order to agree the issues
- define – deciding whether the issue is a problem to be solved or a decision to be made, taking appropriate action

EPs frequently require to employ similar logical process in order to determine how best to approach any given problem scenario and this forms part of the assessment – intervention continuum and is a key part of the work undertaken by all EPs.

Change and innovation

...in a constantly changing world, it is essential that organisations are also able to change. To be successful, they must constantly strive to adapt to new challenges. The changes may be innovative or strategic, physical or behavioural...

(Boulden *in* Heller et al, 2002)

Being responsive to change implies the need for up to date information and knowledge. One key way of ensuring that managers or leaders are fully apprised of latest developments is through the CPD mechanism. This may be by way of ongoing training courses to *top up* knowledge or through the establishment and dissemination of best practice in this area.

Reid and Barrington (*ibid*) assert that the philosophy of continuous development is particularly pertinent as:

...the pace of change in the modern world demand[s]...that organisations are structured and managed in such ways as to help the learning happen...[and]...that employees, especially managers, maintain an attitude of mind which believes in learning, promotes the integration of learning with work and seeks to learn about learning itself...

Two reasons why management training may not have featured particularly highly on the agenda for EPs are:

- the skills and knowledge base required to be an effective EP would appear to run parallel to those required to be an effective manager
- underlying theories, principles and techniques of management training are based on research carried out by social psychologists and organisational psychologists

However, if we, as a profession, are to guard against stagnation and ensure innovation, effectiveness and efficiency, it would appear reasonable to suggest that access to training and development modules in the area of management skills is a positive way forward.

What Needs to be Managed and by Whom?

It is important here to distinguish between management tasks or functions and the management role.

Management tasks or functions can be described as *management with a small m*. That is, those self-regulatory practices including time, workload and stress management or general peer support which are utilised by all EPs at all stages of their careers.

The management role refers more to those promoted positions (i.e. (some) senior EPs, depute principals and principals) where there will be a more formalised and clearly defined remit detailing a necessity to have a greater degree of responsibility for the monitoring, support and supervision of work carried out by others, or for overseeing the effective running of projects and working parties, the deployment of resources, and higher levels of decision making.

How does this map onto the profession of educational psychology?

As the profession stands, the *management role* can be seen in general terms to be performed by those occupying promoted positions (i.e at senior EP level or above), although this varies across psychological services.

Access: Who would be Eligible for management Training?

Whilst ideally access to management training should be open to all EPs at all stages of their career, it is feasible to assume that many EPs, at least in the earlier stages of their career, will be more preoccupied with self-regulatory management functions pertaining to acquiring the necessary prerequisite qualifications, skills and knowledge of professional competence.

“...at the beginning of their career, as [relative] apprentices, people are probably most conformist. Upon obtaining organisational ‘tenure’ and reasonable security, they embark on a period of maximum creativity...”

(Schein, Ibid)

Therefore a more practical approach may be to suggest that management training be available to EPs as a CPD activity/career progression upon achieving chartered status. That is, after successful completion of one year supervised practice and acceptance by the British Psychological Society (BPS) onto the register of Chartered Psychologists.

Traditionally, those who are promoted to managerial positions, or positions with greater levels of responsibility, have been deemed to have significant experience or expertise in an area related to the practice of educational psychology. Less onus is therefore placed on the actual role and functions of effective management itself.

...to become a manager does not automatically confer wisdom greater than that found amongst people who are not, and are never likely to become, managers...as organisations increase in size and administration and technical complexity, it become increasingly difficult for any manager to get a detailed grasp of what is going on...

(Lupton, 1991)

Thus appropriate training in management techniques and strategies would appear to be fundamental to ensuring *good service delivery*. This raises an important question for our profession in considering the necessary balance between having a manager who is particularly skilled as a manager of people and resources but also one who is particularly knowledgeable in a wide range of practice within applied educational psychology.

Benchmarking: What is the State of Play in Management Structure & Training in Other Professions?

Clinical psychology

Whilst the varied settings in which the profession of clinical psychology operates make it difficult to establish a definitive picture, in general terms, it can be seen to mirror the current experience of educational psychology. There are differences in career progression between the two fields whereby clinical psychologists are initially graded A (maingrade equivalent) and acquire Grade B (senior equivalent) following acquisition of appropriate experience and expertise. Grade B is confirmed by way of evidencing appropriate experience (time served) and expertise and through appraisal interview. In this sense the Grade B stage could be interpreted as a promoted post similar to senior grade in educational psychology. Management roles tend to be carried out by those promoted from within the profession who are deemed to have sufficient experience and expertise. From those clinical psychologists interviewed the view would appear to be that, whilst they do have a CPD framework, there was little awareness of any specific training for those wishing their career to progress towards a management role.

Social Work

Colleagues in social work operate within the Performance Review and Development (PRD) framework, which is largely similar to the CPD mechanism, although it does have more of a performance appraisal slant. As part of this process, workers are asked to engage in discussion about a range of their professional duties and review previous practice, and plan for future practice and the development of the social work services as a whole. Built into this review system is a section on *management competencies*. Workers are asked to comment on their evaluation of their previous performance and to identify future needs and issues for action and development in the four key areas of:

- managing people
- managing resources
- managing change
- managing risk

Whilst this system would appear to imply *management tasks* or functions at all stages of career progression, those social workers interviewed stated that the *management role* tended to be carried out by those occupying promoted positions (i.e. senior social workers and social work services managers). Similarly there was little awareness of any *stand alone*

management training for those social workers wishing to follow a career path towards a management role. Promotion criteria for management roles again tended to come down to the factors of experience and expertise.

Human resource & personnel professions

The Human Resource and Personnel professions have well-established structures not only to afford training opportunities in management but also to continually appraise the efficacy and effectiveness of those operating within management roles. The downside of this, when considering educational psychology, is that these professions deal predominantly with the corporate business world and as such it is not clear whether their experience can be readily or easily transferred into the context of educational psychology within the Scottish education system.

Towards a Structure and Framework for the Acquisition of Management Skills

We have identified that management training *per se* does not currently exist in any substantial form as a stand-alone or discrete entity, not only within the field of educational psychology, but also in the above selected *parallel professions*. We have also argued that the provision of training opportunities for those currently in management roles, and also those wishing to follow a career path towards such roles, can only serve to augment existing good practice and to promote future efficacy in this area of working within local authority psychological services.

The CPD framework would appear to be the most logical and responsive mechanism by which to access such training opportunities for psychological service staff. In this sense it is particularly important for service to have a clear and explicit structure to allow the acquisition of skills. Not only in the area of delivery of 'direct psychological services' but also in the organisation, implementation, review, development and support structures available to individuals and services. This is necessary in order to be able to effectively deliver services. The supply of appropriate and relevant training opportunities and, by extension, the establishment of who is responsible for their provision, evaluation and possibly even their accreditation, is a significant and related issue. If the argument is towards establishing more training opportunities for *managers* and those wishing to be managers, then a host of questions as to provision and funding are raised:

- would the profession of educational psychology seek to establish its own training courses (perhaps through such structures as the PDP)?
- would there be greater input from the Post Graduate Training Institutions in the areas of management and leadership?

- Would universities be approached in order to provide specific courses in management skills, strategy and theory for those wishing to pursue that avenue?
- Would the profession seek to *buy in* already established knowledge and expertise from other fields, such as the Human Resource profession?
- Who would fund this training?

All of these questions are significant and will require resolution if the profession is to move forward effectively on these issues. As has been stated already, managers of psychological services can be seen to hold major responsibilities for ensuring the establishment, operation and evaluation of structures and processes in service which provide CPD opportunities to access management tasks. This raises issues for evaluating management with regard not only to training but also in terms of management accountability. There are clear responsibilities for managers in terms of people management and indeed the numbers of staff to be managed in any one service. However, this debate is outwith the remit of this PDP group and it is hoped that either future groups or other forums will take up this challenge.

A Management Framework: One Proposal

Psychological service management: towards a standard

Much of what is outlined here is drawn from *The Scottish Qualification for Headship* (SEED, 2001), the *Quality Assurance in Education Authority Psychological Service* (Mackay, 1999), and the *Currie Report* (SEED, 2002) as well as the provisional deliberations of its associated *National Implementation Group*.

EPs need a clear view of the economic and social context in which their services operate and the direction they should take and must also have the knowledge, understanding and skills to lead services effectively. It is essential that those aspiring to manage psychological services are prepared for their tasks. This *Standard*, we believe, should form the basis for a professional programme of training for managers, as part of EPs' CPD, at all levels within Scotland's psychological services.

Psychological service managements: purpose, elements and competence

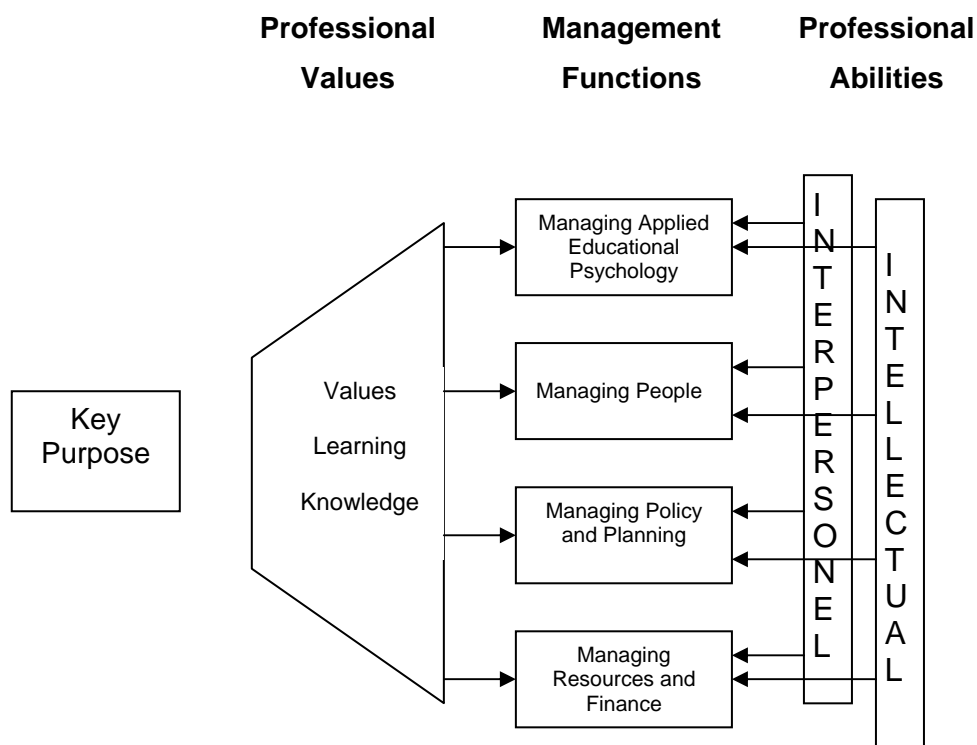
The *Key purpose* of service management in a psychological service is defined as providing the leadership that promotes the highest possible standards of service delivery of applied educational psychology. The three main *elements*, which are developed further in the next section, and which, in turn, underpin the professional practice of service management are:-

- 1 *Professional Values*: comprising individual professional's values, their commitment to learning and development, as well as their knowledge and understanding of applied educational psychology. That is: *WHY they take a certain course of action*.

- 2 *Management Functions*: comprising the key functions in leading and managing a service, i.e. *managing applied educational psychology; managing people; managing policy and planning; and managing resources and finance*. That is *WHAT* are the main management functions.

- 3 *Professional Abilities*: comprising the intellectual and interpersonal abilities on which service managers draw to carry out the key functions effectively. That is *HOW they carry out their functions successfully*.

Competence in relation to the standard for service management is defined as the ability to combine these three elements appropriately in practice. The relationship of the elements is illustrated in the diagram on the next page.



Psychological service management: elements in practice

1 Professional values

This element serves to answer the question: *WHY take this course of action?*

- to hold, articulate and argue for professionally defensible educational psychological values
- to act as a model of a leading professional within the service, committed to their own learning and developing their practice
- to have up-to-date knowledge and understanding of educational psychological development and of the management issues relevant to that

2 Management functions

This element serves to answer the question: *WHAT are the main management functions?*

Managing Applied Educational Psychology

- develop systems for the management and evaluation of effective applied educational psychology
- establish processes to create and maintain the conditions for effective service delivery

Managing People

- recruit and select educational psychologists and support staff
- develop teams and individuals to enhance their performance and that of the service
- plan, delegate and evaluate the work carried out by teams and individuals
- create, maintain and enhance effective working relationships with staff

Managing Policy and Planning

- develop and communicate service values, aims policies and plans
- develop and maintain partnerships with parents, young people, educational directorate, other agencies and the wider community

Managing Resources and Finance

- manage available resources and allocate them to support effective service delivery
- monitor and control the use of resources

3 Professional abilities

This element serves to answer the questions: *HOW* can a manager *successfully carry out these functions?*

Interpersonal Abilities

- demonstrates confidence and courage
- creates and maintain a positive atmosphere
- inspires and motivates others
- communicates effectively
- empathises with others
- values and works through team

Intellectual Abilities

- seeks and uses information
- thinks strategically
- judges wisely and decides appropriately
- identifies and solves problems
- shows political insight

Some Possible Recommendations

1. Future PDP projects might investigate the possibility of setting up CPD modular training on various aspects of management; identify how this would be assessed, who would provide this training, etc.
2. SEED along with ASPEP, BPS and ADES might look at taking forward an adaptation of the SQH for managers at all levels within local authority psychological services.
3. It is important to evaluate whether there is any mileage in more in-depth benchmarking with 'parallel' professions. An evaluation process using a template based on the framework of management responsibilities presented in this paper could be used as part of a benchmarking process between different psychological services.

Summary

In relation to the *Currie Report* and other related and relevant documents we have looked at the issue of management training as a CPD route for EPs. An effort has been made to establish a clear definition of management as it occurs within the profession of educational psychology and a distinction was drawn between *Management Tasks*, as carried out by

psychologists in their everyday practice and the *Management Role*, deemed to entail higher levels of responsibility and decision making. The PDP group also established an argument that specific CPD opportunities in the form of management training would prove beneficial to those seeking to improve practice and knowledge in this area.

This group has offered some suggestions as to what might represent an appropriate stage at which psychologists could wish to pursue such training/CPD opportunities and has raised key issues for later debate, which would have significant implications for the provision of management training through CPD. A framework identifying the key element in practice in relation to those working in a *management role* within psychological services has been developed from the basis of the *Scottish Qualification for Headship* document, *The Standard for Headship in Scotland* and is offered here for consideration by the wider profession.

Conclusion

The *Currie Report* made a number of recommendations pertaining to management, leadership and quality assurance. The challenge for the profession of educational psychology now lies in seeking the effective implementation of these recommendations. With regard to management and leadership the profession as a whole will require to consider whether what we have at present is good enough or whether change is required.

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