PROJECT FOR TRANSITION OF IPED MEMBER SOCIETIES TO THE DIRECT MEMBERSHIP MODEL

PROFESSIONAL DEVELOPMENT WHITE PAPER

SEPTEMBER 2015

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IPEd TRANSITION WHITE PAPER – PROFESSIONAL DEVELOPMENT

EXECUTIVE SUMMARY

Members of this team have developed possible strategies for delivery of equitable, cost-effective professional development programs for all IPEd members. Professional development includes: provision of training for editors through face-to-face workshops and online courses; conferences; accreditation; mentoring; and provision of information on professional development opportunities (including tertiary courses) to present and prospective editors.

This White Paper outlines possible arrangements for professional development programs for IPEd members under a new direct-membership organisation. It describes an approach in which branches will continue to determine their own members' training needs and develop programs to meet them, and will be free in most respects to continue their current practices. However, all branches would receive assistance from IPEd staff and systems (MemNet event management, finance and communication) in advertising professional development activities, registering participants, handling payments and taking on much of the responsibility for promoting all professional development activities. This support would reduce the workload of branch committees.

The paper also discusses the possibility of present and past branch professional development coordinators working together to provide mutual support and exchange ideas, the benefits of alternative online delivery of training programs through webinars and/or Skype to make these programs more accessible to all members, and ways of achieving this. Sharing of webinar programs produced in Australia, Canada, the USA and the UK may also become a real possibility. Provision of equal access to professional development for all members of the new IPEd, no matter where they live, has been a very high priority for Professional Development team members.

With a modified, staged approach to transition, this paper has noted that many of the following recommendations will not be feasible in the first instance, but will be phased in as appropriate under the new IPEd structure.

Stage One development

Establishment of a **Professional Development Working Party** consisting of present and past branch PD coordinators will be a high priority: branch PD coordinators will be asked to begin working together during the first stage of the transition, to discuss and make recommendations on professional development arrangements they wish to make.

Branches would continue to plan and provide training, as at present, with local or interstate presenters. Training event details would be provided to the national office for inclusion in the **online event management system**, which would relieve branches of the management of training registrations and payments. IPEd national office would receive all course fees, and pay presenters and venues. Therefore branch committees (including branch PD coordinators) will be asked to determine their priorities for six months at a time and then prepare a tentative program for that period, including proposed topics, proposed presenters and methods of delivery (if identified), estimated costings based on default or actual payments to presenters and hire charges for proposed venues, and catering and printing estimates.

Until a comprehensive IPEd website, with branch sections, is developed, branch PD activities would be advertised on the existing branch websites (rebranded society websites), and also on the national IPEd website. 'Register now' links in those website event details would link to the event management system, so that members and the public could register online, and pay online or later via cheque, credit or debit card. The system would also provide **event booking** lists for the

branches. (This system is operational for EdVic, and can easily be rebranded as IPEd. This will make an easy transition for the management of membership and events.)

IPEd would continue to subsidise training and mentoring programs to ensure that access to PD activities is as **equally accessible** as possible. As happens at present, barriers to equal access to professional development (or sometimes, any access) will usually result from branch size and associated capacity, and location (long travel distances). Smaller societies sometimes experience difficulty in finding suitable local presenters.

While many professional development activities will be delivered face to face, every effort will be made to make them accessible to all members. This could be achieved by:

- IPEd subsidising or fully funding presenters to travel to other centres (including regional centres)
- IPEd subsidising discount rates to members in remote areas and members from other branches
- supporting branch PD coordinators to develop alternative delivery methods, such as high-quality audio recordings, and online webinar or Skype delivery. Where online delivery is deemed appropriate by a branch PD coordinator and the branch committee, the cost of such expertise will be included in the estimated costings sent to IPEd. **Note that the first step in this process, organisation of a webinar to train branch PD coordinators in the techniques and requirements of webinar presentation, is regarded as a high priority during the first stage of transition.**
- organising Skype sessions for mentoring
- offering bursaries to enable members to attend conferences.

Current arrangements regarding biennial conferences, the Accreditation Scheme and the National Mentoring Program will continue.

Later stage development

The position of Professional Development Officer was not included in the 2013 business case and is not included in the 2016–17 initial budget, but the PD team believes that a part-time PDO would provide real assistance to branch PD coordinators; the first step to achieving this might be the creation of a part-time Administration Officer position until the responsibilities of the PDO have been agreed on and the feasibility of creating the PDO position has been confirmed. The PD Working Party will be asked to consider the responsibilities and qualifications of the people holding both positions. A part-time Administration Officer might be appointed as a preliminary step, as part of the second stage of transition.

Choosing presenters

Branch PD coordinators and branch committees will be able to choose any presenters they like, and will ensure presenters are of high quality by checking the expertise and delivery skills of all potential presenters. In choosing presenters, branch PD coordinators will be able to consult the register/directory of existing programs; this is being built from the existing register of PD programs offered since 2008. It will be available on the IPEd website, in the members-only pages. Addition of the *Standards* covered/to be covered in each PD activity is also proposed.

IPEd TRANSITION WHITE PAPER – PROFESSIONAL DEVELOPMENT

Payments to presenters

The payments currently made to presenters vary between societies and sometimes within societies, depending on the particular workshops offered. We therefore recommend that each branch should pay a fee commensurate with each presenter's qualifications and experience, reflecting their current practice. All branches will be able to vary their default payments if they decide this is desirable. We also recommend that presenters of repeat activities should not be paid less for repeat activities than for the first one.

These questions will be considered by the Professional Development Working Party: they may recommend other options, such as standard payments.

Fees for participants

We propose that each branch committee set their own members' PD fees, reflecting current fees and their local market. However, the PD Working Party may recommend another approach.

Professional development activities will continue to be open to non-members, as happens at present. Fees for non-members will continue to be set at a higher rate than for members and will continue to provide much of the profit from IPEd professional development programs. Fees for full-day/five-hour PD activities may be set at a fixed percentage rate for non-members registering for full-day/five-hour and half-day/two-and-a-half hour activities respectively. Branch PD coordinators acting as a team will be asked to consider this price differential.

Individual IPEd members will remain responsible for seeking and maintaining their own professional development and should expect to pay a reasonable price for PD activities. However, IPEd could subsidise a distance discount, with a cap on the number of members subsidised per workshop.

Benefits for branch committees

IPEd staff (Membership Officer, Finance Officer, Communication Officer and later perhaps an Administration Officer and then a Professional Development Officer) could take on much of the work currently done by society PD coordinators and other committee members: they will publicise PD activities through the IPEd website, e-notices and newsletter, handle registrations and payments, and provide lists of participants.

Branch PD coordinators could supply information (including PD activity flyers they have prepared) for IPEd staff to place on the IPEd website in addition to providing on branch websites.

Evaluation of PD activities

Evaluation will remain an essential part of professional development. Branch PD coordinators will continue to organise the evaluation of professional development activities through evaluation forms; branches might be asked to share at least some overall rating of each presenter, to be placed on IPEd's member-only database if the Professional Development Working Party decides this is desirable.

Coordinating alternative methods of delivery

If sufficient demand exists for online webinar or Skype delivery, branch PD coordinators could work together as a team to decide which branch will organise particular activities that may attract

registrations from around Australia and share these activities out. The IPEd PDO (if appointed) would coordinate this program. The aim is to develop in all branches the confidence, skill and experience in providing such offerings.

Costing PD activities

Each branch's tentative six-monthly schedules of PD activities, complete with estimated costings, will be submitted to IPEd as part of that branch's budget for the next 12 months. This arrangement would not come into effect until the second stage of transition if it is approved during first-stage negotiations.

There will be sufficient flexibility in IPEd's administrative and financial systems to allow branches to change details of these schedules, including costing estimates, if necessary. This arrangement needs to be discussed by the PD Working Party and IPEd during the first stage of transition. Note that the mentoring program will also involve some budget preparation, but it will take a different form.

Administrative procedures

The administrative procedures required for running professional development activities need to reflect both efficiency in IPEd operations (finance, membership system, event management and communication) and the realities of organising training at branch level.

The new IPEd would apply a whole-year break-even calculation across all branches combined in regard to their PD activities, covering both profits and losses. However, a break-even result is not guaranteed. This provision would not come into effect until the second stage of transition.

All branch committees will be able to access continued (and extended) IPEd funding to cover a presenter's travel and accommodation costs if they engage presenters from interstate or distant intrastate. This provision reduces the cost to the branches concerned. It will be of greatest benefit to smaller branches: it will enable branches receiving such sponsorship to charge participants the standard fee in most cases, as happens now.

IPEd conferences

Conferences will continue to be held every two years, as at present. They will be organised by branches in the order established to date (Queensland (2017) → Victoria → Tasmania → South Australia → NSW → WA → Canberra). Branches will be entitled to additional support from IPEd national staff if necessary when organising a conference. They can choose to organise a 'partnered' conference like the 2015 conference.

Any profit from conferences will be retained by IPEd; any losses will also be carried by IPEd.

Policy and procedures will be finalised by 2016, informed by the organisation of the Fremantle conference in 2013, the 2015 conference in Canberra and planning for the 2017 conference in Brisbane.

Accreditation

Some changes to the administration of the accreditation program would be necessary under the direct membership model, but these would be minor and could be made by the IPEd Accreditation

IPEd TRANSITION WHITE PAPER – PROFESSIONAL DEVELOPMENT

Board through amendments to the Procedures Manual. Preparation of applications for renewal of accreditation and assessment of those applications will become easier because MemNet can track continued professional development (CPD) points based on defined CPD values such as conference attendance and participation in training activities and mentoring.

Mentoring

The CSE Mentoring Program has now become the IPEd National Mentoring Program, to be administered by national coordinators on behalf of IPEd. The number of branches involved may increase under the new IPEd; the number of mentees is certainly likely to do so.

Some of the existing procedures may change over time, but these changes can be made by the coordinators, subject to approval by IPEd, and the program's guidelines can be amended accordingly.

Responsibilities of branch PD coordinators and IPEd officers

Current practices will continue during the first stage of transition, with the additions described above. The possible respective responsibilities outlined below will be subject to discussions between the branches, the Professional Development Working Party and IPEd; the responsibilities confirmed during the second stage of transition and later (in particular those relating to the PDO) might differ from those outlined below.

Appendix A: Suggested responsibilities of branch PD coordinators and IPEd officers

Area of activity	Responsibility of branch PD coordinator	Responsibility of IPEd PDO/FO/CO/MO
Development of an annual PD program	Prepare tentative six-month programs in consultation with branch committee and members. ∗ Submit programs to IPEd staff (Finance Officer, Membership Officer, Communication Officer, Professional Development Officer). ∗∗ Provide details of PD activities for placement on IPEd website/place details on IPEd website.	Might coordinate approval of expenditure beyond the branch budget based on the submitted program (FO). ∗ Place details of PD activities on IPEd website (PDO). ∗
Selection of presenters	Make suggestions and first contact with potential presenters. ∗ Book presenters. ∗ Encourage participants to evaluate PD activities. ∗ Check limited-access register of PD evaluations. ∗∗	Maintain and update register of PD activities since 2008 (PDO). ∗ Maintain limited-access register of PD evaluations (PDO). ∗∗
Venue	Locate and book venue. ∗ Send invoice to IPEd FO. ∗∗	Pay venue (FO). ∗∗
Registration of participants	Supply details of each PD activity for placement in IPEd events management system. ∗∗ Apply common cancellation/postponement policy if necessary. ∗∗ Download participants' names and other details. ∗	Place details of PD activities on IPEd website (PDO/CO). Register participants. ∗∗ Manage late registrations, cancellations, refunds, etc. (MO/PDO).
Payments to presenters	Advise when presentation satisfactorily completed. ∗∗ Send invoice to IPEd FO. ∗∗	Make agreed payment (FO). ∗∗
Provision for remote members	Check names and locations of distance members (if possible). ∗ List participants needing special consideration. ∗	Advise branch PD coordinators re applicable IPEd policies (PDO). ∗∗
Other costs (printing, catering, etc.)	Invoice directly to IPEd FO.	Pay according to budgeted amounts (FO). ∗∗
Publicity	Promote through local website, Facebook, email contacts, etc. ∗	Promote through central website and newsletter (CO). ∗
Conferences	Local conference committee to coordinate as per current system. ∗ Local conference committee to supply timely details to IPEd. ∗	Support through publicity, registration, bookings (and more, if necessary), as requested by conference committee (CO/MO/PDO). ∗ Pay all invoices (FO). ∗∗
Mentoring program	Administered by national coordinators on behalf of IPEd, with local branch coordinators, if this becomes an IPEd program. ∗	Provide support for wider publicity, etc. as required (CO). ∗∗ Provide support to national/local

	Travel costs may be incurred if national coordinators are involved in mentoring workshops. ∗	coordinators re payments (FO). ∗∗
Accreditation activities	Duties allocated to branches, administered by IPEd Accreditation Board as at present. ∗	Provide support for wider publicity, bookings, registration, etc. as requested (CO/MO/PDO). ∗ Make payments to renewal checkers (FO). ∗
Register of tertiary editing courses		Maintain and update detailed register of tertiary editing courses across Australia (PDO). ∗

∗ **Existing arrangement**

∗∗ **Proposed new arrangement**