



Council
14 July 2022
CPD Diary: next steps

Classification	Public
Purpose	For decision
Issue	A brief summary of the progress of the Cloud Engage project and a decision about next steps in relation to the development of the CPD Diary.
Recommendations	1. To agree the approach towards the development of the CPD Diary. 2. To consider and provide feedback on communication messages to registrants.
Financial and resourcing implications	As the development of the CPD Diary was not included in the original specification, we have agreed an additional cost for this piece of work being £10k including VAT. This also includes development of other aspects including the access to the research journals and also the Shop function. If we were to migrate over data from the existing Integra CPD Diary to the new Cloud Engage Diary, this would be an additional significant cost. Further information about this is outlined in the paper.
Equality and diversity implications	Equality and diversity issues arise in terms of accessibility of Cloud Engage, the o zone and the CPD Diary. We are considering these as part of the project planning. An equality impact assessment is being developed for the Cloud Engage Project and we are in discussions with Advanced about the accessibility statement for the Cloud Engage project in order to further develop our accessibility user testing.
Communications implications	Internal and external communications planning are an integral part of each of the project stages. This is further outlined in the paper.
Annexes	None
Authors	Fiona Browne, Jessica Davies, Matthew Redford

Key messages from the paper:

- The project work streams of the Cloud Engage project are mostly progressing to plan and the project remains on track to date in terms of the overall timeline. However, there are some additional costs and other issues that are being monitored closely by Audit Committee.
- There remains a risk of slippage in the timetable with further clarify emerging in the coming months.
- There is one issue which requires a decision by Council, in accordance with the governance over the project agreed by Council on 25 November 2021 which relates to the CPD Diary.
- The CPD Diary; link to the journals; and the shop were additional requirements to the upgrade, revealed during the process mapping workshops, and which were not included in the original scope of work.
- These have now been scoped and are being undertaken within the overall timeline of the project.
- A decision is required about what happens to the CPD Diary as part of the upgrade project. There are five options ranging from no CPD Diary through to migration.
- Audit Committee considered the advantages and disadvantages of the options and concluded that a new clean CPD Diary and a fresh start without the complications of migrating data was the best approach.
- Council is asked to agree this approach and provide feedback on the draft communication messages to registrants.

Background to Cloud Engage Project

1. The GOsC has been moving computer-based applications into the cloud environment which provides greater security and reduces risk. The next phase of this project involves:
 - an upgrade of our Integra database to Cloud Engage to ensure that the integrity of the Register is maintained.
 - a refresh of our online zone site for students and registrants to ensure that their experience of registering or renewing their registration, updating their registration details and recording their CPD is streamlined and enhanced.
 - a new CPD Diary
 - an update of the connection from the Register on the public website to the upgraded database to ensure that information about registrants (e.g.

registration, practice details, information about fitness to practise sanctions) continues to be able to be accessed accurately and securely by the public.

2. The project formally started in October 2021 when the Senior Management Team agreed to commence the project, subject to agreement of the governance framework by Council which happened in November 2021.
3. The project work streams of the Cloud Engage project are mostly progressing to plan and the project remains on track to date in terms of the overall timeline. However, there are some additional costs and other issues that are being monitored closely by Audit Committee due to the complexity of the project. There is a risk of slippage in the timetable with further clarity available in August/September.
4. The purpose of this paper is to:
 - seek agreement to the approach to be taken on the new CPD Diary as part of the Cloud Engage project.
 - seek feedback on communication messages around this.

The CPD Diary

5. This year, as registrants came to the end of their CPD cycle we became aware of a number of technical problems with the NetXtra CPD Diary.
 - a. CPD Diaries are being archived on the last day of the CPD cycle
 - b. Individual CPD Diary entries have not saved
 - c. CPD Diary not automatically created
6. A fuller paper outlining the issues and the mitigations that we have implemented was presented to the Audit Committee in June 2022 and is available for Council members via [DocMonster](#) for those wanting additional information.
7. The impact of these CPD issues to a number of registrants has been to cause upset and has had an impact on the reputation of the GOsC. Our position is that the system is old and requires an urgent update / upgrade as part of the existing project. We have been providing 'work around' solutions to osteopaths.
8. These problems have been discussed in depth with Advanced in developing the Business Process Map for the new CPD Diary and we are confident that they understand the issues and we will build all these scenarios into our user testing.
9. More of a challenge, however, is our option for moving forward before the end of the year and decisions about the new system and the new CPD Diary.
10. There are five options each with advantages and disadvantages which are outlined below. These options are:

Option	Description
A	Conclude provision of the current 'NetXtra' CPD Diary at switchover, archive it and send a pdf of the CPD Diary to registrants, allowing a fresh start with a new 'Advanced' CPD Diary
B	Migrate over NetXtra CPD Diary data to Advanced CPD Diary by go live day
C	Migrate NetXtra CPD Diary data to Advanced CPD Diary after go live during an unspecified time period
D	No CPD Diary at all
E	A strategy to enhance the CPD Diary – ultimately moving towards a better repository to store not just reflections, but slides, handouts, certificates etc.

11. These options have been considered by Audit Committee in June 2022 and their recommendation is set out at paragraphs 12-13.

- a. *Option 1 – Conclude provision of the current 'NetXtra' CPD Diary at switchover, archive it and send a pdf of the CPD Diary to registrants, allowing a fresh start with a new 'Advanced' CPD Diary*

Advantages: Fresh start with a new CPD Diary which should avoid the problems with the NetXtra Diary. Avoids cost and risk of migrating old data over (along with bugs and challenges which will likely be inevitable in such a migration). Enables us to keep to existing timeline. Enables registrants to have access to a CPD Diary at all times (apart from the switchover during go live). Registrants will not lose their 'NetXtra' CPD Diary data as we will retain access to it offline and will be able to provide it upon request. We will be able to flag to every registrant that there is a fresh new CPD diary and this could be used to create a more positive communication approach if/when we send them a pdf of their existing recorded CPD data.

Disadvantages: Registrants might expect their existing CPD Diary data to be available in the upgraded system rather than only in the form of a pdf. The amount of staff resources required (will involve manual interaction with each registrant record in order to save and send the registrant pdf to them) – we estimate that this would need to be additional temporary resource (working with an estimate of perhaps c.150 diaries per day, this could be approximately 28 days of work). This approach might frustrate those who have already started completing their CPD Diary for this 2nd 3-year cycle (because they would have part of their cycle in a pdf document and part of their cycle in the new fresh Diary and they might need to send both parts to their Peer Reviewer as part of their Peer Discussion Review).

- b. Option 2 – Migrate over NetXtra CPD Diary data to Advanced CPD Diary by go live day.*

Advantages: Most users might assume that data will be migrated in an update / upgrade. (if there are no problems with the migration). Comms messages may be easier (assuming no problems with migration).

Disadvantages: Could cause a larger public relations challenge if there are any problems with the data migration. Will take additional cost and time and testing time and is likely to extend length of time to go live with consequent costs. Difficult to know if this could be completed by go live date.

- c. Option 3 – Migrate NetXtra CPD Diary data to Advanced CPD Diary after go live during an unspecified time period*

Advantages: Eventually, when the migration is completed, registrants would have both the old and the new CPD Diary entries in the new CPD Diary. This won't affect the go live timeline of the project.

Disadvantages: There are risks if we promise this approach but are unable to deliver in a timely manner due to challenges in the migration or error in uploading this information manually. We risk ongoing poor experience/frustrations for registrants and therefore communications from registrants until this work is completed which is similar to the position that we are in now. However, as we are now nearer to the beginning rather than the end of their CPD cycles, fewer registrants will be as focused on their CPD records. Also, we hope the situation will be improved by registrants' experience of the better functionality of the new CPD Diary. We would also need to be careful not to overpromise e.g. we are working with our external supplier to 'see if it's possible' or to attempt a data transfer, or similar.

- d. Option 4 – No CPD Diary at all*

Advantages: This would enable clarity around how osteopaths record their CPD. There are other ways of doing so and this would continue to offer osteopaths choice. It would enable a clear message and reduce the number of frustrated osteopaths calling GOSc complaining about their CPD Diary.

Disadvantages: a lot of registrants use the CPD Diary (c.76%), they like it and are familiar with it. Removal of the service may be seen as a reduction in the services offered by GOSc causing dissatisfaction. We have already informed registrants that we are working on a new version of the CPD Diary. Reputationally, in addition to going against what we have offered previously, this does not fit with the Communications and Engagement Strategy where we set out to be forward looking and innovative. In contrast, this would likely be seen as a regressive step.

- e. *Option 5 – A strategy to enhance the CPD Diary – ultimately moving towards a better repository to store not just reflections, but slides, handouts, certificates etc.*

Advantages: the current CPD Diary would be a staging point on that journey to something that was more fit for purpose.

Disadvantages: this option would need to be scoped out further before offering as an option and making a decision and agreeing a cost and a timeframe as it is not within the scope of the current project. In an ideal world, this option ought to be offered by the professional body. However, the size of the Register and the proportion of the membership that would take it up offered by another body was not sufficient to make it commercially viable when it was considered by the iO a number of years ago.

Audit Committee recommendation

12. The Option A – a new clean CPD Diary and a fresh start without the complications of migrating data from NetXtra to individual CPD diaries of registrants has its attractions both for registrants and for GOsC. This approach would retain the familiarity of the diary, removing the legacy of problems and enabling all osteopaths to have a pdf of their CPD Diary entries to date. It would avoid any risk of the problems that might be sustained in migration of the data from one company to another including additional cost, risk and timeline. However, we recognise that whatever option we choose, it will be a difficult communication message and we will not please every registrant.
13. On 23 June 2022, Audit Committee considered the options and felt that Option A presented the best balance between meeting the needs of the registrants and concluding the challenging problems with our existing provider and agreed to recommend this to Council.

Communications messages

14. On 23 June 2022, the Audit Committee asked the executive team to consider our communications messages to osteopaths if Council went for Option 1 and emphasised the importance of early CPD communications.
15. The following draft communication messages have been prepared since the Audit Committee on 23 June for feedback from Council. We are also preparing a more detailed communications plan which will ensure consistent, ongoing and clear messaging for osteopaths.
 - We have listened to the experiences of osteopaths using the existing CPD Diary and have identified the need to make changes as part of our project to improve the o zone. The CPD Diary will therefore be upgraded in early 2023 to better support osteopaths in recording their CPD activities throughout each three-year CPD cycle.

- When the new CPD Diary is launched, all osteopaths will receive a PDF copy of the previous CPD Diary (including all entries made up until the date that the new Diary is launched). This means the new CPD Diary will not include entries made in the old system. Osteopaths will need to keep the PDF copy of their previous Diary entries safe until they need to revisit them as part of their Peer Discussion Review or, if randomly chosen, their Verification and Assurance submission.
- It is important to remember that osteopaths **do not** need to upload, submit or send us their CPD records, evidence or [Peer Discussion Review](#) template during or when they complete their CPD cycle.
- Osteopaths must always keep their records of CPD activities, including all evidence such as notes, reflections and any certificates, safe. The only time an osteopath would be required to send us a copy of their records is if they were randomly chosen to do so as part of our CPD [Verification and Assurance process](#).
- The upgrade of the CPD Diary will not directly affect osteopaths renewing their registration. However, when completing the Renewal of Registration form via [the o zone](#) osteopaths will need to declare the CPD that they have completed and recorded over the **previous 12 months**. Osteopaths who have used the CPD Diary before it is upgraded may therefore need to revisit the PDF copy in order to make this declaration.
- Osteopaths do not need to use the CPD Diary to record their activities as it is **not** a mandatory part of the CPD scheme. CPD can be recorded in whichever format works for each osteopath, for example a Word document or an Excel spreadsheet. More information is available in the [Keeping a CPD record workbook](#).

Recommendations:

1. To consider and provide feedback on the progress of the Cloud Engage project.
2. To agree to recommend to Council the approach towards the development of the CPD Diary.