PebblePad for Performance and Professional Development Review or PPPPDR

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Theme(s)
Learning: Employability
Teaching/Professional practice: Continuing Professional Development
Organisation: Managing Organisational Process

The background context

The Performance and Professional Development Review (PPDR) itself was a modification of an existing appraisal process which was still primarily paper based. It was challenging to introduce a new, institution-wide electronic process which, although not mandatory, was recommended as offering efficiency, reusability, and support for a 'living' appraisal and Continuing Professional Development (CPD) discussion and document. There were concerns over the introductory/threshold skills for staff in many areas of the University, but also concerns over engagement with the concept of PPDR even before the technology was considered.

The project selected a 'Profile' in PebblePad because this seemed to offer the easiest route that could accommodate complete beginners and regular PebblePad users. The field driven entry and completion seemed to offer the steering and direction it was felt were vital.

Why PebblePad?

In the first year of the new PPDR process, PebblePad was only one of the ways of supporting the underpinning professional dialogue. In the Centre for the Development and Enhancement of Professional Practice (CDEPP) we had experience of supporting appraisal using PebblePad, but needed to push this new process as primary and the platform as something Faculties and Services felt that they had choice over.

In the actual roll-out, the agility and flexibility of PebblePad lead to a much stronger uptake of the PebblePad PPDR Profile than we anticipated. The support and framework PebblePad offered for a reflective and discursive process persuaded more

use and increased the completion rate for Appraisal/PPDR to over 90%. (Sector average = approx. 70%).

The purpose

The PPDR was a refreshment of the Appraisal Scheme, to ensure that the review methods for both performance and professional development activity aligned with the plans and priorities for the University's development.

The PPDR discussion (both face-to-face and electronic) covers:

- Clarification of expectations and objectives regarding job role.
- Any aspirations that staff have and the guidance, support and professional development they may require.
- How individual staff roles make a positive impact on, and contribution to, the Faculty/Professional Service they work for and, in turn, how what they do links directly to achievement of the University's plans.
- The ability and requisite steps to realise career development potential in ways which support the University's future requirements.

The approach

Timeline: Immediate 12 week rollout
Stakeholders: All Faculties and Professional Services
Existing Model: PPDR = strategic adaptation of appraisal process

Design: Planned to be an iterative process

We asked the question "Why not use PebblePad to complete your PPDR?" In all formal communications it was recommended that the PPDR process was completed using the PPDR documentation available in PebblePad, as this would most easily enable ongoing review and reflection on progress and achievements, and the accumulation of evidence and feedback to enrich the PPDR discussion and regular follow-up professional discussions throughout the year. However use of PebblePad was not required.

> Proposed Benefits:
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> - The easy to use PPDR Profile in PebblePad offered an efficient way to compile and update staffs' PPDR documentation, whether using reflections and evidence previously stored in PebblePad or writing as they went.
> - The Profile was easy to complete **and** easy to share.
> - The PPDR process using PebblePad offered economy of effort for both individual staff and their line managers this year.
> - The benefit of reusing documents and evidence, saving time and effort, in future years.

All PPDR documentation, including extensive guidance, login to PebblePad and hints and tips to complete through PebblePad, was made available in a Webfolio via the PPDR Profile itself.

Links were provided to Frameworks, Plans, and Strategic Documents:

- Research & Scholarship Plan
- Leadership & Management Framework
- Association of University Administrators Professional Standards
- UK Professional Standards for Teaching and Supporting Learning in Higher Education
- Professional Standards/Benchmarks
- Internal Professional Development Programme
- Internal Development Days (& the requirement to attend) once known
- Academic Workload Planning
- UoC additional information and support
- Faculty Action Plans/NSS information
- Professional Service Plans

The result

One of the early unanticipated outcomes was that one Faculty who were using PebblePad extensively already, asked HR and the Project Team for permission to design their own PebblePad Form, which would present the whole document on one page and offer a much simpler look. The Project Team was happy to endorse this kind of 'ownership' of the process, and HR agreed with the proviso that consistency of naming and headings was maintained.

One Professional Service asked for permission to adapt the Profile and created their own Webfolio design, and this also was approved.

As of February 2012, we have completed a project stage 'Reviewing & Refining the Performance and Professional Development Review'.

Following the positive response to, and high level of participation in, the PPDR process, we invited feedback on the experience of engaging in the PPDR, including the use of PebblePad. We also asked how the benefits and quality of engagement in the PPDR process could be enhanced for individual users and team leaders. To shape and improve the process for the next cycle, we prepared a brief online survey to enable feedback.

We set up a 'Review & Evolve' Group for the PPDR to looking at how we further enhance the process, to ensure that it was meaningful and productive.

The biggest challenge proved to be that of the PPDR as a live document that staff and line managers revisit continually to monitor progress against performance objectives, reflect upon CPD, and attempt to offer timely feedback, discuss any problem areas, and plan for the future.

We received positive feedback about:

- the ease of use of PebblePad,
- the linking and compiling of evidence,
- the platform it offered for a 'live' document,
- the ability to comment and collaborate before, during and after the PPDR formal meeting,
- PebblePad being flexible enough to allow adaptation and ownership of the process.

We received negative feedback about:

- the Profile itself seeming very formal,
- the layers in the profile making a clear overview difficult,
- the Traffic Lights not being very helpful,
- commenting being too open and flexible,
- there being too many pages,
- printing after completion being too complex.

The feedback helped us redesign both the layout and the asset type. We have moved to a pared down Webfolio. This has made it easier to take a copy at Formal and Interim Review Stage and then continue moving forward with a rolling reflective/evidencing process.

The impact

The PPDR process has increased engagement with the appraisal process dramatically. HR and CDEPP were initially pleased when response/completion rates hit 75%, but we eventually reached 90%. Although the use of PebblePad was not required, approximately 75% of respondents used PebblePad as the method of completion and sharing.

> The impact of being flexible in approach and allowing re-design for increased ownership was also very positive. The Professional Service who adapted the profile and used their own Webfolio design, and the Faculty who adapted the profile and used a single page Form, both reported strong and early uptake, positive feedback about self-designed assets, and better staff engagement with the underlying process. This was pleasing because it resulted in staff perceiving the process as more relevant to their specific professional context.

Publicity

The PPDR Project Team successfully bid for small project funding from the Leadership Foundation for Higher Education Small Development Projects Fund to carry out further work on

the alignment of objectives and employee engagement through effective performance and professional development reviews.

The aim of the project is to further refine and evolve the PPDR process to ensure and enhance the quality of engagement in the PPDR and future planning. It is vital that we build on the good work already undertaken at the University since the launch of the PPDR in May 2011 to ensure that the PPDR is an agile, reflective process that facilitates continuous improvement at an individual, team, departmental and organisational level.

Among the objectives:

- Refine further the University's recently developed PPDR process and explore how dynamic the process can be whilst retaining and enhancing quality.
- Consolidate the building of leadership capacity and effectiveness through strategic performance management and professional development, by monitoring progress against performance objectives, timely feedback, discussing any problem areas, and planning for the future.
- Explore the relationship between the quality of ongoing PPDR discussion referencing departmental performance and engagement measures such as the National Student Survey (NSS), staff survey results, benchmarking against professional frameworks, and the overall performance of that Faculty/Service.
- Enhance the underpinning technology (PebblePad) as the tool to complete the PPDR. Explore how PebblePad enables an agile process that facilitates continuous dialogue and collaboration between colleagues, and makes it easier to reflect on, develop and evidence professional and performance objectives through a professional eportfolio. Consult with Faculties/Services about ownership and customisation of the PPDR documentation in PebblePad.
- Share all outcomes with the HE Sector (not just HEIs with current PebblePad licences).
- Create a toolkit and dissemination strategy to ensure the wider HE community benefit from all project outcomes and the recent learning and innovation that has taken place in this area at the University of Cumbria.

Lessons learnt

We decided in the early stages of planning that, although an institution-wide rollout was much more challenging than a small scale pilot, the simultaneous and shared learning process would contribute much more evidence and avoid dissipation of energy and momentum.

The challenge was to roll out a new process AND also offer an optional technology solution. The primary concern was support for the process, but in many cases people were facing two challenges: a brand new appraisal and a completely new software tool.

We supported this through formal workshops and informal drop-in sessions. We operated an almost open door policy to individual staff and line-managers. This was a very time consuming process but we feel it paid dividends.

One of the key things we would have done differently was to be both more directive and prescriptive about how to fill in the PPDR itself. We felt that the flexibility and openness of the PebblePad environment would be seen as reassuring, but anecdotal and survey/drop-in session feedback suggested that many staff just wanted to be told exactly how to fill in the form, where to comment, exactly what constituted evidence, and

how much written text, and linked assets constituted proper and sufficient engagement. As the great Stomu Yamashta said 'Freedom is Frightening'.

We would also have endorsed and pushed customisation of the documentation much more strongly had we known the impact this kind of 'ownership' would have. The variety of asset types in PebblePad offers a design freedom which we now push much more strongly. While we were aware at the start-up of the project that we were working at the limit of our staff capacity to both develop and support this work, we would have the confidence now to offer a variety of solutions for local customisation.

In brief – making the case for PebblePad

Employability/CPD

Using PebblePad to connect strategic performance management and professional development in an ongoing cycle of planning, reviewing and rethinking, offers flexible and agile support for enhancing lifelong learning and employability, and institutional strategic organizational development. The privacy and control of PebblePad as a Personal Learning Space (PLS) meshes well with the shared (but private) professional dialogue of an online appraisal process. The 'living document' and the ongoing nature of PDP fit together extremely well.

Managing Organisational Process

The scale of this project, involving all staff across the whole institution, meant that efficiency and sustainability were crucial concerns. PebblePad offered a common platform which many staff were familiar with, a manageable training threshold for those who had not use PebblePad before, and a large-scale effective way of deeply embedding digital literacy skills in a professional context.