

Performance For All Newsletter

June/July 2012



Overview

Performance For All (PFA) is an HE sector project open to all institutions from the UK and abroad. It was launched in partnership with the University of Bristol in 2011 to address the opportunities and challenges of implementing cutting-edge, sector-focused performance management. The project has been open to the sector to maximise the potential for sharing between institutions with similar challenges. With over 45 HEIs in 4 continents now on board, the project is entering its second year and is offering a wide range of benefits to partners both offline and online.

Experiences from Ulster



Here in Ulster, we started implementation of 'ItsGenie' Performance Management software, in my own department, Human Resources, in late January 2012. To date we now have all four HR departments; Legal & Admin, Recruitment & Consultancy, Employee Relations and Health & Safety (39 persons in all), up and running, all to varying degrees of complexity depending on when their involvement started. In Addition, we have 4 workgroups in our Information Services Department poised and ready to go, (they are just as I speak finalising their work group goals), that's a further 31 persons. We are also involved in on-going discussion with the 'School of Computing and Maths' where a number of key academics are reviewing the software from the 'academic' viewpoint. This is all in line with our initial pilot objective of trialling this software in Human Resources, ISD (with a particular view to looking at SFIA) and an Academic department.

The reception across this broad range of departments has been unanimously positive, ranging from pleasantly surprised to positively delighted! At the simplest level, even if nothing else were to be achieved apart from putting online our DAR 'forms' process (Development Appraisal Review) that alone would be a major step forward. That was our starting point and it was immediately obvious that this was a 'win win' situation for all areas. However 'ItsGenie' is just so much more. Following the DAR implementation, we moved to look at the 'Learning module' with initial focus on the 'essential training'. It was relatively easy to set this up for all Job Roles

and immediately we had a vehicle to easily manage the completion rates for essential training courses such as 'Fire Safety Awareness', 'Manual Handling' etc. These courses are all online on our portal but it has been notoriously difficult to get any statistics for departments regarding who has or has not completed the training. It is our understanding that in the 'live' implementation of 'ItsGenie', we will be able to link to the course on the web and subsequently back to 'ItsGenie' to log the completion details.

The Pie Chart on the 'It's Me' page is very visually effective and you can see immediately if a new essential training course has been added and requires completion. Needless to say, our Staff Development department were also very impressed with this module when it was demonstrated to them.

In addition to these two modules, staff in HR, (ISD to follow shortly), have also started using the software to track workgroup and individual goals. The 'View line of sight' feature never fails to impress as it is very satisfactory to be able to see your individual goals, feeding into a team goal, feeding into a departmental goal and finally back into one of the corporate goals for the organisation! This is a very powerful feature.

Finally, although we have only been using the software now for just over 3 months I couldn't end without mentioning 'Competencies'. In parallel with the implementation of this pilot, we have also been rolling our 'Competency Framework' across the University. I took this opportunity, with regard to my own team, to set up their competencies against the

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Do you want to be part of the fun?

Trials run to August/September using version one of the software. Universities are still very welcome to join the trial group to use and test the tools for themselves. All we ask is that you take an active part in the PFA project and feedback your implementation views to our software developers so the tools get even better.

To take part contact:

Christian Carter

PFA Project Manager

christian.carter@bristol.ac.uk

Christian is now working on the project for two days a week.

We have produced a handy leaflet aimed at explaining what the project is all about, and you can find a copy at www.performanceforall.org. This was launched at the 2012 Universities HR Conference in Kent 15 – 18th May. [Feel free to use the pdf version](#) for your own promotional purposes it gives a good 'what's it all about in two minutes' overview.

Experiences from Ulster continued...

job roles in 'ItsGenie' for personnel within my department. I tailored the structure to three stages to meet our requirements and set everyone up at the minimum of stage one. I have now asked my staff to add learning activities, either those completed or to be completed, against each of their major competencies to provide evidence that they are now operating at a stage two or three. There can be no doubt that this has really helped with regard to the greater understanding of the competency framework.

Róisín cowan, Deputy Human Resources Director



And from the other side of the World... What is happening at Griffith?

Griffith University is one of two Australian PFA partners running successful trials. John Swinton Associate Director (Organisation Development) gives some initial thoughts...

At Griffith, we have started off with a group of Office of HRM - mainly in the OD and Health and Safety teams - about 25 staff overall.

Over the next couple of months our intention is to extend this to colleagues in other parts of the University's administration units -

Finance, Student Administration, and Learning Services... and hopefully one of University's research institutions. The overall strategy is to move fairly gently, extending the scope gradually as part of an overall cultural change.....too often, implementing new online systems results in push-back to the technology with negative impacts on the "main game", the cultural change. (Griffith is presenting a paper at this year's Australasian administrators' conference titled "It's the culture, stupid!"). As part of the cultural change strategy, we have given the system itself a working name - work management program - to reflect the huge benefits of the system to staff, teams and managers in planning and managing work...

Performance for ALL.

Engaging Academic Colleagues

The first PFA Working Group Meeting is going to be held on the 19th of June at the University of Reading.

A four hour (working lunch) workshop and discussion hosted by the University of Reading (a PFA Trial partner) to explore the practical and cultural challenges faced by Universities in obtaining academic staff 'buy in' to on-line performance management.

Booking: There is no charge for PFA Trial group members for this workshop. Please book your place with: Julia Marsh, Clerical Assistant, 0118 378 6249, j.m.marsh@reading.ac.uk

More info: Ruth Busby, Deputy Director of Human Resources, University of Reading

e-mail: r.c.busby@reading.ac.uk



The new PFA Online tool launch is imminent

This week we were given a sneak preview of the PFA software which is being launched in August, and we are extremely impressed. The software supplier, ItsGenie, has really been listening – and whilst developments will of course be ongoing, even the first version of the software is going to dramatically improve the user experience and make implementation, roll-out and administration much easier.

The Review, Goal and Learning modules have all been updated, with new features and improved usability being added throughout. The August release, amongst other things, includes newly designed tools designed specifically for PFA to engage and support Academics, to deliver induction, to manage project teams, to roll-out value/behaviour frameworks and to share best practice amongst PFA partners.

Here is just a very small flavour of the things to come:

- New appraisal form technology which auto-saves as you go along, allows even more flexibility in the presentation of the form, can carry forward information to future reviews, allows you to see a history of you changes and thoughts and allows you to invite in additional reviewers.
- A notepad designed for HE. Sitting alongside the appraisal form users and reviewers can now record one to one's, thoughts, upload documents and share ideas. Notes can be shared with any combination of supporters, or kept absolutely private.
- A completely re-designed 'actions' page allowing most actions to be cleared with a single click.
- A completely new 'notifications' tool which allows you to see what is going on within your organisation and team at a glance.
- The ability to set up 'project teams' within the organisational structure, allowing your staff to manage projects, the people involved and the goals in the same way as any other workgroup.
- New functionality to manage induction and better manage essential training across your whole organization.

This Month's Q&A

Q: How is the Performance For All project governed?

A: PFA is headed by a **Steering Group** of HE Human Resource Directors covering a broad range of institutions and countries. They represent partner institutions that are committed to the PFA objectives. The Group provides a strategic overview for the project, accommodating the pressures and changes that the sector is experiencing, and ensuring alignment with the long term direction the sector is taking.

Underpinning the Steering Group, a series of **Working**

Groups, targeted at senior managers in the sector, enables partner institutions to collectively address common issues including:

- Effectively engaging academic colleagues in the staff development process
- Understanding the implementation of behavior and competency frameworks in the sector
- How to roll out performance management developments across an institution

Regional Groups meet to offer project leaders and implementation team leads the opportunity to share the hands-on issues arising from implementing new systems and driving culture changes in their institutions.

Benefits PFA Partners benefit from...

- Access to a unique network of sector professionals at all levels who are addressing the same challenges in their separate institutions.
- Involvement in Regional and Working Groups.
- Access to a wealth of support and development resources and experiences generated by the Working and Regional groups and shared between partner institutions.
- Access to online forums and resources addressing the challenges of performance management.
- Links / access to key individuals in other institutions who have already started the implementation and change processes linked to improved performance management.

Follow Us We want you to stay in touch. How about...

Visiting our website:
www.performanceforall.org

Following us on Twitter:
[@performance4all](https://twitter.com/performance4all)

Joining us on the
www.JISCmail.ac.uk mail
list: Performanceforall

Or just e-mailing us:
christian.carter@bristol.ac.uk

Performance For All Partners

PFA partners work closely together to develop and implement sector focused performance management knowledge, systems and processes.

- University of Abertay in Dundee
- American University of Dubai (UAE)
- Anglia Ruskin University
- Arts College Bournemouth
- University of Bradford
- University of Bristol
- University of Cambridge
- University of Chester
- City of Bristol College
- City University London
- University College Cork
- University College Falmouth
- Dalhousie University (Canada)
- University of Derby
- Durham University
- University of East London
- University of Essex
- University of Exeter
- Griffith University (Australia)
- Harper Adams University College
- JISC
- Lancaster University
- University of Leeds
- Leeds Metropolitan University
- University of Lincoln
- University of London
- London South Bank University
- University of Manchester
- Murdoch University (Australia)
- National Composites Centre
- Northumbria University
- Norwich University College of the Arts
- Oxford Brooks University
- Queen Margaret University, Edinburgh
- Queen Mary, University of London
- University of Reading
- SOAS, University of London
- University of Southampton
- University of Surrey
- Trinity Laban, London
- UCL
- University of Ulster
- University of Wales, Newport
- University of Wolverhampton
- University of Worcester
- University of York

Performance For All Objectives

- Develop an effective web based environment into which current 'paper' based staff development and review processes can move quickly in order to immediately increase efficiency and save money
- Develop a tool that can automate the staff development and review process from the centre, collate participation rates, and make communication of staff review processes simpler.
- Develop a method of improving the quality of goal setting and an opportunity to link individual with team, department and organisational goals.
- Develop a way of making sure that people, teams and the organisation are happy that they are 'on target' to meet agreed goals and offer the support before problems arise.
- Create very simple to operate, light touch, system that shows a clear 'line of sight' for people with the objectives of the organisation no matter what role they undertake.
- Develop a way to communicate and monitor essential training in areas such as diversity, data protection and safety.
- Develop a way to promote competency and behaviour frameworks in that make sense to people and adds value to their role.
- Create opportunities to harness the power of such data in order to develop corporate succession planning, learning needs and skills audit processes into the future.
- Develop a flexible dashboard that can be added to with current or future local performance management modules, metrics or tools.