PFA: Performance Management in Higher Education

Background

Performance for All (PFA) is a project run by universities for universities. For two years we have been working with over 50 Higher Education (HE) institutions in five countries to understand and develop best in class performance management approaches, solutions and processes for the HE environment. PFA is led by a steering group of HR Directors from across the diverse HE sector.

PFA is about understanding, addressing and sharing the specific challenges of improving individual and organisational performance in HE today. As well as developing a comprehensive online system and ways of working to support this, PFA members are also invited to local, regional and national knowledge sharing and development workshops and conferences. To make sure we understand what can be achieved and what will maximise the benefits, PFA has recently commissioned an academic study to inform and support approaches, development activities and return on investment metrics.

"The pressure on universities from increased competition and greater student voice is likely to lead to only the most effective and efficient universities succeeding in the medium and long term"
Ronnie Magee, HR Director at Ulster University at November PFA conference

What does PFA do?

The PFA project is designed to help HE institutions put in place the systems, processes, ways of working and reporting that will maximise the performance of the organisation by maximising the performance of its people.
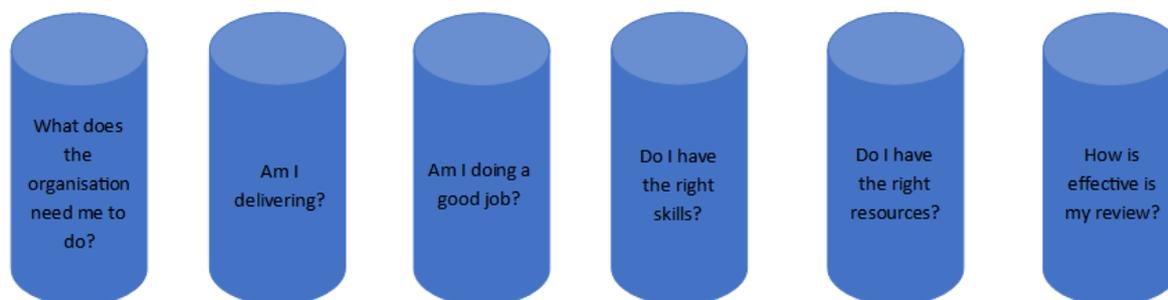
Direct outcomes include:

- Increased focus on achieving organisational goals

- A highly engaged workforce that understands the organisational goals

- Greater organisational agility

- Ability to deliver more with the same/less resource (greater effectiveness)

- A more engaged, skilled, productive and less stressed workforce

- More effective talent management and succession planning

What is the PFA approach?

PFA focuses on six key areas – the PFA Pillars of Performance Management:

1   **How do people know what to do?** How effective is the organisation, its departments, faculties and teams at communicating objectives and goals to individuals? Can teams and individuals align their objectives effectively with the higher level team and organisational aims? Can people see how they fit in?

2   **Are we on target?** How effective is the organisation, its departments, faculties, teams and individuals at knowing they are on target to deliver? What happens if there are issues or new opportunities? How quickly can the organisation communicate and respond to change?

3   **Are our people doing a good job?** This is the difference between a person hitting targets and a person doing a good job. For example, a target might be hit, but were the values and behaviours of the individual congruent with the organisation?

4   **Do our people have the skills they need to be effective?** How does the organisation identify and support training needs, gaps and career development opportunities? Does the organisation choose the best talent when putting a team together? How does the organisation manage talent and succession planning?

5   **Do our people have the resources they need to be effective?** How does my organisation, its faculties and its teams ensure that individuals are given the appropriate resources to deliver?

6   **How effective is the old way of doing things (the review/appraisal process)?** Is it achieving the outcomes required by the university? Many PFA partners had been using the review process to, for example, set objectives and consider skill gaps. Whilst annual (or more frequent) review remains extremely important, many of the themes above become far better and more efficiently delivered through processes which are more continuous and embedded in the ways of working of the organisation.

Factors affecting individual performance

| What does the organisation need me to do? | Am I delivering? | Am I doing a good job? | Do I have the right skills? | Do I have the right resources? | How is effective is my review? |

In all 50 of the HE institutions we have worked with, different parts of the organisation have had different strengths and weaknesses. PFA is designed to ensure that where an organisation (or team) has good processes and practice in place, these are retained and built upon.

What can PFA do for me?

The PFA team and its partners can work with your organisation and individual teams to help understand current practice in more detail and identify opportunities for improvement. We are HE people doing this for HE organisations, and so understand the challenges our particular culture faces, as well as the tremendous opportunities if we get things right.

PFA has developed, for both academic and support staff, an online system and ways of working which can be used institution-wide to help fill the gaps. This has been designed to integrate easily and seamlessly with your existing systems and to be customised and implemented at different rates in different parts of the institution. If you already have systems or processes which are effective (for example HR/LMS/Research Output systems) we would look to complement these, not to replace them.

PFA partners can start by implementing our highly acclaimed online review process across part, or all, of the organisation. This is quick and simple to implement, and adds immediate value with minimal change. It is also designed to be used as a foundation for introducing more sophisticated functionality over time.

PFA also provides its members with:

- **PFA Readiness Assessments:** We consider your existing ways of working and what the actual, measurable benefits of working with PFA would be for you. We suggest the options, timescales and likely success of implementing performance management systems in specific teams/parts of your organisation.

- **Implementation planning:** Drawing on our experience of what works and what doesn't work in over 50 universities, we can support you throughout the entire implementation

process, from defining success criteria to ensuring positive buy-in from your support staff, your academics and leaders.

- **Training and coaching:** Where it is required, we can engage and train your people in new ways of thinking and working.

- **Local, regional and national workshops:** We run regular workshops designed to share knowledge, experience and to develop new ideas. Recent workshops have covered topics such as academic staff engagement and building the business case for performance management.

PFA has developed a suite of online tools which integrate with your existing systems and can deliver:

- The ability to communicate or refresh organisational goals to all staff instantly

- Organisation, team and individual goal alignment

- Online appraisal/review

- Behaviours, values and competency frameworks

- Skills assessment using skills frameworks

- Staff training and development including compulsory training (e.g. health and safety, diversity, fire, environment)

- Induction and probation processes, exit interviews and 360 tools

- Course/activity management and booking

- Succession planning

- Talent management