

Implementation of the CPD Framework case study

<i>Name of Institution:</i>	Buckinghamshire New University
<i>Title of Project:</i>	Work Shadowing Pilot Project
<i>Level:</i>	Team – One Administration
<i>Date of Project:</i>	December 2010 - August 2011

1. The Project Brief

Buckinghamshire New University saw work shadowing as a way in which it could meet demands for personal and professional development from its professional service employees whilst also benefiting the business through knowledge transfer and skills development. The University wanted to support individuals in their continuing professional development and career progression by promoting ways in which they could learn and understand more about the work undertaken by their colleagues.

The objectives set for the project reflected this dual purpose and it was expected that, by undertaking work shadowing, employees would:

- expand their knowledge of other employees' roles
- build partnerships within and across teams
- increase their understanding of how their own role fits into a wider context
- update their skills through observing how others work, and undertaking part of the role themselves
- develop self-awareness in terms of their own career progression plans as promotions become available
- enhance their own performance
- become more confident and assertive through working with new partners
- initiate and facilitate change through example
- be encouraged to express their own views and opinions in a non-threatening environment, thus helping to prepare them for future roles where they may need to be able to present rationales for change or new ideas
- become more motivated and open to changes in their roles which are integral to the concept of "One Administration"
- share and disseminate knowledge and best practice

2. Project Context

On 1 September 2010 Buckinghamshire New University introduced a revised administrative support structure. The skills, expertise and experience of professional service employees from the University's two Faculties and the Academic Quality Directorate were redistributed and blended into "One Administration" with the vision of providing support across teams through the development of consistent processes, and by strengthening the career structure

and personal development of professional service employees. Three of the main aims of the One Administration structure were to:

1. break down the silo mentality where it existed and improve communication
2. provide support for colleagues
3. share expertise and best practice

The third aim was seen to be particularly important as, with a reduced workforce, very specific knowledge and skills were now concentrated in fewer people, thus potentially creating a risk to the business.

Furthermore, it was felt that the professional service employees would benefit from the knowledge that the University was serious about their personal and professional development, which would help to enhance self esteem and overall morale, and that work shadowing would ultimately help to provide the University with an upskilled, better informed and motivated workforce.

3. Project Participants

For the pilot project we used two main criteria for the selection of participants. Firstly we needed to be able to evaluate how well shadowing worked in different shadow/host situations, and secondly we needed to make sure that the project did not have a detrimental effect on the participants' own workload or on that of their teams. To this end we limited the numbers involved to five pairs, and identified five areas of provision that we could evaluate. These were:

- ◆ A sharing of knowledge and practice between central and faculty services
- ◆ A sharing of knowledge and practice in an area with professional requirements
- ◆ Enhancement of knowledge and skills for potential internal promotion candidates
- ◆ A sharing of knowledge and practice of the same role across two Faculties
- ◆ A sharing of knowledge and practice in an area with work-based learning

The Project Sponsor produced the advice notes, and all the forms used during the project, and also arranged and facilitated the five planning meetings and the five evaluation sessions.

4. Outline of approach taken

Engaging the Line Managers:

November 2010 - A *Project Plan* (Appendix 1) was produced in consultation with the University's HR Department which identified roles for each of the five areas of provision, gave some principles for the pilot project and also established a brief timeline. We also identified the individuals we wanted to select as participants.

December 2010 – first meeting with our Consultant where we looked at the *Project Plan* and discussed ways in which to engage the participants and their managers. We were advised to invite the shadow's manager to the planning meetings. Line Managers joined our meeting to hear details of the *Project Plan*, meet our Consultant, establish any concerns, and for us to ascertain what they wanted to get out of the project and secure their support.

January 2011 – first informal discussions with potential hosts held, and formal approval from their Line Managers sought.

Engaging the Hosts and Shadows:

January 2011 – all hosts were contacted by email (Appendix 2) to confirm their positions. Once the hosts had confirmed their willingness to take part, a similar invitation was sent by email to the shadows. (Appendix 3). All were sent a copy of the *Project Plan* and the *Advice & Preparation Notes* (Appendix 4). All of those invited to take part agreed to be either hosts or shadows – subsequently at the evaluation stage we heard that by being invited to take part they had felt recognised and valued by the institution.

The Planning Stage:

January and February 2011 - Planning meetings were organised and held involving the Project Sponsor, the host, the shadow and their Line Managers where available, and details recorded on the Planning Contract (Appendix 5). The main objectives for both shadow and host were discussed. Shadows also identified areas of particular interest to them and specific questions to be addressed, while the host considered areas which they thought would benefit the shadow and also identified those areas which would have to remain confidential. The type of shadowing was also discussed along with practical arrangements and the number of sessions proposed, with the initial date being agreed at the meeting where possible. All the shadows wanted to take a hands-on approach, preferring to become actively involved in the work of the hosts, undertaking tasks alongside each other, and learning by doing rather than by watching. Shadows and hosts were asked to consider how they would give feedback to each other and to their own teams, and were encouraged to keep a *Personal Learning Log* (Appendix 6).

At the Planning meeting, both hosts and shadows were asked to look at the AUA CPD Professional Behaviours Framework and to give themselves a score for each area on a scale from zero (no competence) to ten (fully competent). These were then kept by the Project Sponsor with a view to comparing them with the same exercise to be undertaken after the shadowing opportunity had been completed.

Implementation:

Once the Planning meeting was over, responsibility for the shadowing sessions was handed over to the hosts and shadows themselves. This gave them the flexibility to arrange sessions as tasks came up, at times which were mutually convenient. This degree of independence for organising sessions to the best advantage was crucial to the success of the project. Sessions took place between February and July 2011, and depending on the nature of the work being shadowed, lasted between an hour to a whole day as required. The participants who used the Personal Learning Logs tended to do so as a way of checking that the objectives were being met (hosts), or as an *aide memoire* with the expectation that it would be valuable in the future in terms of evidence for career progression (shadows).

Interim Feedback:

As the project progressed, shadows and hosts gave feedback to their colleagues in the office and at team meetings which generated additional interest in the scheme. In April 2011 a presentation was given to 80 delegates at the Bucks New University Annual PSE Conference. Entitled “*So what is it you do again? The Work Shadowing Project at Bucks*”, the presentation was given jointly by the AUA Consultant (setting the project in its national context) and the Project Sponsor (details of the project implementation), and included first hand feedback from some of the pilot project participants. While some had only experienced one or two shadowing sessions, they reported that they could already see the benefits in terms of sharing of knowledge, good practice and challenges and improving communication.

5. Evaluation

By July 2011 all the shadowing had been completed and evaluation meetings were held with the shadows, hosts, their Line Managers where available, and facilitated by the Project Sponsor. In advance of the meeting shadows and hosts were asked independently to complete their section of the *Evaluation sheet* (Appendix 7) which asked:

- Which aspects of the shadowing went well?
- Were the objectives met?
- What was most useful to you?
- Where could improvements be made?
- How will the learning be used and shared?

Positives from the shadows included:

- Gaining in confidence in own role
- Sharing learning with own teams and using in own job
- Feeling valued by being invited to take part
- Recognising a change in own attitude to work
- Having discussions about processes – better communication
- Getting to know other campus/teams
- Feeling welcomed and involved
- Gaining a better understanding of the university as a whole

Positives from the hosts included:

- Reflecting on own practices as part of the process
- Sharing of experiences for benefit of both sides
- Discovering had similar challenges though in completely different academic programmes
- Learning new techniques from the shadow
- Making a contact in another Faculty
- Improving cross-Faculty communication
- Realising the need to disseminate information about own area to a wider audience

At the evaluation meetings shadows and hosts were again asked to undertake the scoring exercise with the AUA CPD Professional Behaviours Framework, and it is interesting to note that when the evaluation meeting scores (post shadowing) were compared with the original planning meeting scores (pre-shadowing), cumulatively most individuals had increased their scores and thus their perception of the level of their knowledge, skills and behaviour. In total, the shadows had increased their scores in all but three of the areas (Appendix 8), while the hosts had increased them in all but one. (Appendix 9).

Areas which shadows and hosts considered needing more development included:

- Recognition of the amount of time needed for preparation (hosts)
- The importance of establishing whether whole days were required or whether shorter sessions would be more profitable
- Not allowing sufficient time to cover all that was needed (shadows)
- Finding the all important balance when both the host and shadow had time to devote to the sessions

To mark the end of the pilot project, a Work Shadowing Evaluation Workshop was held in August 2011. Attended by an audience of managers from across the University, and also by the Vice Chancellor and Deputy Vice Chancellor, the Workshop gave an opportunity to promote work shadowing to a wider section of employees. The AUA Consultant and Project Sponsor gave a presentation about the Project, and once again the participants spoke of their own experiences – with even greater confidence than they had at the conference in April! At the end of the Workshop it became apparent that work shadowing had a future beyond the pilot project, with a demand for it to be extended to more departments, to include

all staff, and to utilise the pilot participants as champions to promote work shadowing across the University.

The pilot project has thus had a positive impact on the University as a whole:

- the pilot participants are keen to promote work shadowing and support future shadows and hosts
- the provision of specific, targeted development for PSEs has been welcomed, and has made the participants feel valued
- the discovery that colleagues face similar issues but can overcome them together by sharing good practice has been a motivating factor for administrative staff

6. Conclusion

The conclusions we can immediately draw from the project are these:

The original objectives set for the Project were met and even exceeded, with improvements in communication across teams and campuses being one of the most important outcomes.

For the pilot project having a project sponsor was key – by providing a framework with which the participants could engage, and guidance through the needs of the planning and evaluation meetings, the project sponsor gave focus to the project in its early stages. Once the participants have been through the process they themselves can provide the focus and guidance for other colleagues.

In order for shadowing to be successful the participants must be enthusiastic and really want to do it, and must be willing to put in time for planning as well as undertaking, the shadowing.

The support of colleagues is crucial, both in terms of having the support of line managers, and for shadows to be welcomed into their new, temporary team – feeling comfortable with colleagues makes for a better learning environment.

Flexibility is key, both in terms of arranging sessions and determining their length, but also involving other colleagues who may not necessarily be the host but who can give added value to the opportunity. There is also a need for a get-out clause – where the pairing of host and shadow is not working, there needs to be a mechanism for calling a halt to the arrangement through the line managers.

Work shadowing gives an opportunity for discussions in non-threatening situations – open and honest conversations were held and points made which would not have been raised in a more formal setting.

Shadows and hosts noticeably gained in confidence as the project progressed, and are going to be enthusiastic champions for work shadowing at Bucks in the future.