

Planning for Professional Development — Advice for the Manager

Using the job itself as a key PD tool, identifying core competencies, assessing skills, and reviewing available opportunities leads to an effective PD plan

By **Cynthia Golden**

This issue of EDUCAUSE Quarterly inaugurates a new section of the magazine focused on professional development. As EDUCAUSE's new Executive Director of Professional Development, I welcome the opportunity to share ideas, experiences, and useful information about professional development for IT professionals. In future issues, guest writers as well as other members of the EDUCAUSE staff and I will discuss topics such as professional mentoring, making career choices, recruiting and retaining IT staff, the changing nature of professional development, investing in the IT staff member, and more. With each edition you may see an article intended for a different audience, ranging from IT staff members to new managers, directors, or CIOs.

In this first article I lay the groundwork for a successful professional development plan for staff. If you have ideas to share or suggestions for future topics, please contact me (cgolden@educause.edu).

Getting Started

As information technology professionals who work in higher education, we know that professional development is important, both for ourselves and for our staff members. We understand the reasons why it is important, too. Staying current in IT has never been easy, and the rate of technological change and level of complexity that we face continue to increase. The role of IT

in higher education is changing, moving to a new level of importance to our institutions. Life-long learning is required of us if we, and our institutions, are to prosper.

We know that participating in professional development activities gives us fresh perspectives and new ideas, provides a time for rejuvenation and reflection, and helps us develop new, leading-edge skills. Our institutions benefit from our professional development efforts as we work toward continuous improvement of our core mission of supporting teaching, learning, and research. They benefit when we bring back innovative solutions to pressing problems. They benefit when our staff members feel motivated and happy, resulting in improved employee retention.

However, developing new skills needed to stay current and to advance in our careers, while responding to the many demands made of our IT service organizations in this fast-paced world, can seem like an impossible challenge. Where does one start?

In professional development, as in most other areas, making a good plan is essential.

The Job Itself

In a paper presented at the 1998 CAUSE conference, Michael Eleey of the University of Pennsylvania and Lynn

Oppenheim of the Center for Applied Research pointed out that while there are many ways to provide professional development to IT staff, the most important professional development tool we have is the job itself.¹ Creating and maintaining a job that provides the staff member with opportunities for growth and learning, then correctly matching the individual to the job, is “key to keeping talented, intelligent, and ambitious IT professionals.”

IT managers today aren't bound by the old rules or the old ways of thinking. Applying the well-worn adage that asks us to “think outside the box” has led to new approaches to flexible job design. Some very simple and commonsense changes can lead to immediate improvement. For example, at one institution the help desk staff traditionally worked from 8 a.m. to 5 p.m. Simply staggering staff hours slightly on overlapping shifts resulted in expanded hours of service, ability to handle a higher volume of phone calls more quickly, and more staff being cross-trained in multiple tasks. The improved services to the campus generated compliments to the team, which resulted in pride in the job and commitment to continuous improvement. Led by a manager who was an effective agent for change, this team became highly successful.

From a professional development perspective, designing jobs that involve assignment rotations and cross-group training can provide an enriching experience for the staff member. It also builds skill sets across the group. In situations where this can be done, everyone wins.

Begin by Examining the Job

The starting point for any IT manager in creating a professional development plan, then, is to examine the job and understand the skills and competencies it requires. Are the core competencies required for success well understood? Is the job well described, in writing, so that requirements are clear? Does the job description reflect the current situation within IT?

In many of our institutions, IT jobs change from year to year. As institutions, we have responded to change by rapidly implementing new technologies, changing organizational structures, and developing new approaches to solving old problems. If we examine some of our positions, we can see a clear illustration of the impact of change. How many programmers, for example, use the same software tools, development platforms, and interface concepts that they did five years ago, or even one year ago? Our staff have had to learn new technical skills at a very rapid pace to stay successful.

In addition, most of us have come to realize that “soft skills” are just as important as technical skills. Many of our staff work in cross-functional teams. This requires communication, organization, and teamwork skills beyond those needed to develop a good program or install a router. Technical staff members are expected to build consensus among stakeholders on projects, to translate technical information into easily understandable text, and to develop project plans involving people from across the university and corporate communities. Having the skills to perform this kind of work proves critical to success in a given position.

This constant change and the corresponding flexibility required in IT are evidently here to stay. Much to our frus-

tration, many of the technical skills that we need to succeed in our rapidly changing environment will become obsolete within months, not years.

Probably the most significant thing an IT manager can do to foster a rewarding environment for staff is to develop a capacity for change. If the organizational culture includes the ability to respond quickly to new demands and pressures, the organization will have a much better chance of surviving in the increasingly competitive world of higher education. IT managers can encourage the staff, through communication as well as action, to embrace change as a source of renewal, revitalization, and success for both the organization and the individual. None of us wants to become stale or outdated in our skills or knowledge.

It is equally critical for IT staff to understand the university’s strategic plans, including how those plans relate to the mission of the institution and where IT services fit in to the overall plan. It follows, therefore, that individual professional development plans be aligned with the mission, goals, and objectives of the institution.

Being aware of the competencies required to perform the job well is critical, now more than ever. If position descriptions aren’t current, they should be revised to be current and reflective of the changing roles, responsibilities, and skills necessary to perform the job effectively. This revision should take place annually.

Assess Skills and Develop Goals — Together

Assessing the skills of the individual currently in a given position and identifying the areas of strength and areas for further development will form the foundation of the professional development plan. The best time to begin this work is during the formal annual performance review process.

Ideally, the annual performance review should mark a milestone in an ongoing process of communication between the staff member and the supervisor. After the manager has made a pass at reviewing and updating the

job description and corresponding requirements, it is important repeat the process with the staff member. He or she is actually doing the job right now and may have insights to share or recognize things the manager missed in defining the position and its competencies. The supervisor must make the ultimate assessment, but most people know what it takes to do their job and where they need further development, and can contribute greatly to their own development plan.

By reviewing the job description and talking candidly about potential gaps in the individual’s skills, the manager and staff member can together establish professional development goals to eliminate those gaps. In this way, individual plans can be tied to required job competencies, and an ongoing dialogue occurs between the staff member and the supervisor (who takes on the role of a coach or mentor). It requires diligence on the part of both people to keep an ongoing discussion of progress and needs alive throughout the year. A continuous review of how well goals are being met fosters good communication and allows for just-in-time adjustments to the plan. This honest assessment of skills and the development of professional goals provide the foundation for the PD plan.

Take Stock of Opportunities

Professional development can happen in various ways. When many people think of PD, they visualize the traditional conference, which offers a chance to obtain current information on leading-edge activities at other institutions, to see demonstrations of new technologies, and to network with colleagues. Participating in these kinds of events can be an important piece of a PD plan, but should not be the only element.

Special-topic workshops, where the attendees spend a day or more on the development of a particular set of skills or examination of a particular topic, can effectively address specific needs identified in the assessment. For example, a newly promoted manager would benefit from spending in-depth time

PD Opportunities Abound

National and regional conferences — stay current, build a network of contacts

Special-topic workshops — delve in-depth into one topic

Peer-to-peer training — share lessons learned and develop new skills

Web events — take advantage of audio and video presentations by experts in a discipline

Online tutorials — obtain just-in-time skills, study when leaving the office isn't practical or possible

Books and periodicals — sample the print and online materials abundant in IT

Online communities — develop a network of peers and explore issues over a long period

Professional organizations — get involved

on developing a set of skills in the areas of communication, budget management, conflict resolution, and similar responsibilities encountered in the new job. A network engineer leading the technical aspects of a building renovation may find a project-management refresher workshop quite valuable. Typically, special-topic workshops take the staff member off-site, with immersion for two to five days in an intensive program, often with follow-up throughout the year.

Not all PD activities require staff to leave the institution. Participation in online communities focused on a pertinent topic can not only help the staff member get exposure to an area important to his job, it can also create a network of contacts that will move with the staff member throughout his career. Opportunities exist to contribute articles to professional journals and to serve on local and national committees of professional organizations. Taking advantage of Web-based conferences and events, regularly reading books and periodicals related to one's discipline, or monitoring a listserv can all be part of a well-rounded PD plan.

Bring It Back Home

Requiring staff to regularly and formally report on their PD activities is an important activity in itself, one often overlooked. The "report" can range from a formal, written document posted on the department intranet, to a short presentation during a staff meeting, to an informal roundtable update and discussion. The key is to set the expectation that sharing what the staff person learned is part of professional development. Not only will the staff member participate in the event with the idea in mind of sharing what she has learned, but those unable to participate will become aware of the value of the training or event and its potential impact on the organization.

Spreading the word about a good set of Web resources, a helpful reference book, or a useful listserv will ultimately benefit everyone and help to maximize dollars spent on a particular activity. It also serves to build a sense of commu-

nity among the staff members, and encourages collaboration and sharing on all fronts. In a sense, PD becomes part of everyday life on the job.

Take the Show on the Road

Presenting work in a regional or national forum provides another opportunity to grow professionally. Our professional associations and conferences, as well as corporate technology events, provide forums for us to share our successes, ideas, and challenges in a friendly and typically collegial atmosphere. Effectively presenting our work and representing our institutions is an integral part of the PD process in higher education. Responding to a call for presentation proposals can be a valuable experience, and having a proposal accepted for the first time can be exciting and rewarding. Actually making a presentation at a conference involves preparation and planning, gives one experience in a public forum, and helps develop confidence.

Choosing from among all these PD options and working them into a usable and renewable plan becomes the joint responsibility of the supervisor and the staff member. Reviewing the job and core competencies, developing a set of PD goals together with the employee, and reviewing available options will result in an agreed-upon plan, ready for implementation.

Develop a Timeline

While the content of the PD plan is important, equally important is the process followed to implement it. Developing a timeline for execution of

the plan, including setting specific dates for achievement of goals and sticking to them, is part of the recipe for success. The PD plan for the year should include dates for specific events as well as time periods during which certain goals will be accomplished. For example, establishing a schedule for a follow-up presentation after a staff member attends a conference assists the staff member in planning and sets expectations for sharing the wealth.

Once the plan is written, it provides a vehicle for discussion and a planning document for the future. Combined with ongoing communication between a supervisor and a staff member, the PD plan will become a constantly changing document. Mid-year adjustments in response to changing needs of the institution or individual will be easy to make.

The rapid pace of change in our field requires us to be flexible, nimble, and easily adaptable to change. Through careful assessment of job requirements and staff skills, flexible job design, and good communication about goals and options, a manager and a staff member together can create an effective PD plan to meet these requirements and develop and maintain skills needed for success, both individually and institutionally. *e*

Endnote

1. See <<http://www.educause.edu/ir/library/html/cnc9829/cnc9829.html>>.

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