TURNING COFFEE DRINKING INTO KPIS: CREATING MEANINGFUL EDCUATIONAL DEVELOPMENT MEASURES

As Director of the Learning Development Centre (LDC) at City University London since 2008, I have always been concerned about how, as a team, we can measure the impact of what we do. My interest in this is threefold:

- wishing to evaluate the work of the team and usefulness of service for others, particularly in terms of demonstrating impact
- exploring pathways and ideas for new developments and innovation, as well as revising existing activities that no longer matter
- enabling others to understand what we do

In this article, I outline some of the challenges about measuring educational development and outline what we have done at City University London to address this.

Why is measurement important?

Given the current economic pressures on Universities, demonstrating how we make a difference as educational developers is even more important. Central services departments are often regarded as "overheads" that do not directly contribute to the main income generation activities of the institution. It is not merely about "value for money" because this is extremely difficult to articulate in an educational development context, but more about how we make a difference. Sadly, there is sometimes complacency around this issue; anecdotal arguments I have heard say that what we do as educational developers is too subtle to measure or that a measurement culture is tantamount to some kind of management control and heresy; that it is too reductionist; that it is obvious that we are necessary; that the measures are useless. Furthermore, the notion of a service culture can sit uncomfortably with our work as academic departments and could be seen as an anathema to our academic freedom. Whilst there maybe some truth in these statements, if we do nothing then unsuitable measures will be imposed upon us. If we believe that what we do is important and does make a difference then we need to demonstrate how and where we add value and why we are relevant for staff.

In my experience, educational developers are often highly value driven individuals who have made a commitment to making a difference and wish to see that difference realised in the work of others. Leading a group of staff who on the whole feel passionately about what they do and have moved into the area of educational development because they want to make a difference, it seems obvious that they should be given the opportunity to evaluate this.

Sector context

How and what to measure is of concern to many educational developers. Nationally, the Heads of Educational Development Group (HeDG) and SEDA have been discussing these very issues. Internationally, the Australian Council of Academic Development sponsored Teaching Quality Indicators project explored how to recognise and reward quality teaching in HE with a view to implementing a set “of agreed indicators and metrics in universities and across the Australian university sector” (2010). Part of this attempt to define a national set of standards was to indicate who was responsible for measuring these and the role of educational development units in both monitoring such standards and whether their work could be measured through this framework. The set of eight KPIs was wide ranging and comprehensive covering areas from strategy to SoTL. Could such a method be useful for UK HEIs?

Discussions within the UK have raised a variety of concerns about this approach, particularly the focus on senior management satisfaction. Could just working to a senior management agenda lead us to become too political in the delivery of our services? Nevertheless, there was an acknowledgement of the importance of agile rhetoric in communicating with different stakeholders to demonstrate our impact. What came out strongly was an urgent need for educational developers to take the initiative as there was a concern that if we did not demonstrate capacity to measure our own impact, we ran the risk of having measures foisted upon us. That is not without problem though, as what constitutes a meaningful measure is contentious. Given that in institutions often the subtly of the role of educational development units is not always fully appreciated, it is frequent to find discussion of measures such as accreditation, NSS scores, audit reports, student evaluations, retention, distance learning programmes and so on being lauded as appropriate methods of measuring our impact. Yet these cannot be measures of the work of educational development staff because you cannot contribute direct cause and effect. Other measures just generate the "so what?" question; so take up of new technologies, number of National Teaching Fellows, number of HEA fellows and so on, may all be things we may think we want to measure, but why? What difference does this make? We need to work through a process of understanding how and why these measures may be useful by closing the loop between the numbers and then the impact.

David Baume (2010) has used Kirkpatrick's work on evaluation as one method of potentially assisting with the measurement of impact. Kirkpatrick's (1994) four areas for evaluation of learning are:

Reaction - how the learners react to the learning process

Learning - the extent to which the learners gain knowledge and skills

Behaviour - capability to perform the learned skills while on the job

Results - includes such items as monetary, efficiency, moral, etc.

Baume paraphrased by these into the following questions:

1. Did people like it?
2. What have they learned from it?
3. Have they applied what they learned to their practice?
4. Have results improved?

This resonated with me in terms of my own team. We spend a lot of time on questions one and two – the kind of "happy sheet" culture. This may not be a problem, but it is not enough. We need a more systematic and deeper approach.

The City Context

The LDC came into existence at City from the merger of two existing teams, with common interests, but different cultures. It performs the common functions of most central educational development units – providing academic accredited programmes, supporting academic staff in education and research, developing innovation particularly through the use of technology.

The creation of the new team provided the opportunity to rethink what we did and focus our minds on the measurement issue. My main driver has for this has been the desire to introduce more of a measurement and evaluation culture to improve motivation and work, as well as ensuring we meet what is required by our stakeholders. As an educational development team we need to be agile and find measures that we are happy with; that we believe have meaning and that can be adeptly handled to give information to others that they can understand. And without sounding patronising, this notion of understanding and being able to communicate that value to others is very deliberate. Often we get too close to our work and are then unable to articulate clearly to staff the breadth, value and extent of our work.

We tackled this in a number of ways over the past two years. Initially we ran a service development workshop with key staff across the institution to ascertain what shape they would like the LDC service to be, what value they saw in it for the staff and those areas of the service that needed development. This workshop was very successful. We were able to gather some significant information from stakeholders about what they would like from us in terms of offer as well as determining what they thought of as good service, and where we embodied this. The notion of the LDC as the “emotional intelligence” of the organisation came to the fore – a friendly, approachable and supportive service that acted as a refuge and place of comfort for staff struggling with competing demands and pressured workloads.

We then commissioned a consultant to work with us on designing some KPIs. Commissioning a consultant was met with some scepticism, but although our consultant was not an expert in educational development she is an expert in branding and had worked in the HE sector. She gave us a valuable fresh perspective and brought in new ideas to our thinking. The consultant built on the work from the workshop and spent time talking to key stakeholders formally and then chatting to other staff informally. She did a very sensitive and thoughtful piece of evaluation which outlined our core “audiences” and how we could reach them, as well as identifying the types of things we wanted to measure and why. Her work made me realise that firstly we needed to select a few measures and stick to these – the “keep it simple” approach – and secondly that we could use a variety of methods in measuring the same thing. So we could mix and match approaches, which would give us the agility we required. This work formed the basis of a full team away day where we considered different areas that we wanted to measure and how. Key to this work was:

- The area had to be measurable, and preferably in more than one way
- It had to be something that we were used to measuring otherwise we wouldn’t do it
- The measuring and recording had to fit with our vision and values
- We had to produce meaningful data
- We had to demonstrate impact

Some of these areas were easier to address than others, for example what do we mean by impact did cause a significant amount of discussion. Additionally, there was some resistance from the team because there was concern that they would spend all their time completing hugely time consuming spreadsheets without purpose. Others could not commit to a helpful measure or were not convinced the data would be useful. Some others had issues with the notion of us being measured as a service and found this antithetical to our role as an academic department. On a more positive note, there was a general acceptance around the notion of evaluation and continuous improvement even though some of the tactics were more problematic.

At the end of the day though we came up with a set of seven areas that we felt we could comfortably measure. However, we were still left with the “so what?” question. What did any of this actually mean?

Resolving the “so what” question

In order to address this we spent a few mornings as a team over a two month period trying to work out what was the essence of the team, how we could couch this in some clear objectives and then how would we know we were successful. What did success look like? How could we get there? And how would we know what to do to get there? These sessions were positive in refocusing the team and enable us to think about our propensity to take on too much which could result in us clouding our communications about what we did and where we made a difference. At the end of the two months, we agreed the following objectives:

1. Recognition: Collaborate with staff and students to celebrate and publicise successes
2. Expertise: Demonstrate expertise through thought leadership, developing practice and/or research informed practice
3. Development opportunities: Create and promote opportunities for staff to engage with new learning and teaching techniques and dialogue around their practice
4. Team: Exemplify good practice by actively participating in knowledge sharing and cross-skilling within the LDC team and collaboratively contributing to the LDC environment

What could have resulted in a rather clichéd and managerial process actually was enjoyable and fruitful, uniting the team in common thinking and ensuring that we were able to describe our work to others clearly without falling back on a couple of tried and tested activities (usually the MA in Academic Practice and our work with Moodle, both of which are great in themselves but don't demonstrate the breadth of what we do). It also enabled everyone to see what they gave to the team and pitch their work in relation to these broad, common purposes.

Building the Lego solution

However, we still had a key issue that we could not codify - although we had a much more sophisticated understanding of the breadth of our work; what were our success factors and how did we capture much of the intangible work we do? Those "coffee conversations"? By "coffee conversations" we meant those "bread and butter" areas of educational development work where we frequently have informal and serendipitous conversations with staff that don't necessarily produce a tangible output but are vital for building trust, developing relationships and sowing the seeds of ideas to change practice. These conversations are often regarded as the *raison d'être* of the team and essential for us performing that emotional intelligence role, yet almost impossible to codify and measure in a meaningful manner.

This was where the consultant working with us told of us a genius idea which has truly helped us embed the culture of evaluation and measurement in our work. Lego. Or actually to be more precise – Lego timesheets. The idea came from an IT developer who wanted an easy way to quantify his work on different activities (Taylor, 2008). We suddenly realised that this could be a low maintenance, easy way to measure those serendipitous meetings and "intangibles". By attributing a different colour to each thematic area of our work (determined in our KPIs), and a green Lego base to each School, we could see easily how much time we were spending in Schools and on what activity. Each block represents half an hour and staff from across the team add blocks to their Schools on a daily or weekly basis – whenever they can. Staff from the LDC are allocated to work with specific Schools in our School liaison model. On a monthly basis, we record the results which are used as part of our evaluation activities.

The Lego idea has worked for the following reasons:

- It is a quick, simple and easy way of recording things that usually cannot be recorded
- It is fun – no really! – people have built all sorts of shapes and there is a low-key element of competition between the staff. No-one has yet built the Eiffel Tower but we have time…
- People like doing it and can immediately see how much time they have been spending with Schools and on what activities
- Staff from the Schools come into the office and notice the timesheets – they prompt comment and discussion. Some Schools have even been shocked at their figures, so much so, they go and work to get the sheets more populated
- It is flexible, we have changed the categories over time and also enables meetings that cover a variety of topics to still be codified easily
- It keeps evaluation and measurement in our minds as we can all see it in the office and so is helping to change the culture into one where we appreciate the value of measuring our activity.

The downside is that is still does not immediately work on those third and fourth levels as defined by Kirkpatrick and Baume, but what we have been able to do, by encouraging staff to think differently as well as engage in something that is more creative, is free their time from mechanistic measurement to get them to then capture elsewhere good case studies or stories where these conversations or activities have influenced practice. By demonstrating how much time we spend working with others, the inevitable “so what?” question is answered as staff have more time to think through what they were actually doing in those meetings. Merely being able to capture the “coffee conversations” has been massively beneficial and has succeeded in improving the team perception of the value of measuring impact.

But…. so what? What have we done with all this information?

Our work on measurement and KPIs is continually evolving but has given us a wealth of valuable data that we have been able to repurpose in a number of different ways.

Firstly, we created quickly a “10 things about the LDC” document that gives information at our finger tips from the data we have collected. It is a snapshot of our work and attempts to get to the impact question. This has helped the team communicate clearly the range of activities we do.

Secondly, we were able to easily create a Critical Success Factors report which comprehensively captured the range of what we do as a team. The team felt proud of the report and could clearly see the benefit of our work on KPIs. This report is available online and contains a range of data and measures and attempts to capture the “so what?” angle.

Thirdly, we are building a set of case studies and examples – termed vignettes – which outline the impact of our work on practice. Now we are more focused on this activity we are more attune to possibilities. A vignette could be any activity that we do and in any format, but we are focusing on how we can use these in multiple ways. Examples of this are our case studies about Moodle adoption.

Fourthly, we have changed our services. For example, based on a more systematic evaluation, via the KPI work, we changed our researchers’ programme from seminars into a much more successful full day event and we have transformed our professional development programme. We have gone for a more bespoke model, with some central activities and include built-in follow-ups and sessions with attendees to ascertain what changes they have made to their practice and why. The frequent question that we now feel more comfortable asking is, ok but “so what”? And we are more confident to answer this.

Fifthly, we are able to engage with institutional measurement initiatives on our own terms. Recently, the University undertook a zero-based review (ZBR) of all services to ascertain staffing levels and service offerings. In contributing to this activity we were able to provide data that we were comfortable with and demonstrated that we were measuring ourselves as well as being aware of our own development needs. Having a comprehensive set of metrics, agreed KPIs, an awareness of and practice of an evaluation and measurement culture, was enormously helpful in meeting with the ZBR team to describe what we did and why.

Sixthly, we are planning a longer activity around user journeys as part of an extended user needs analysis piece of work to ascertain the real impact of what we do on a few staff members, so we can see in practice their challenges and needs and how we can better support them.

Finally, improvement in the motivation of the team and an understanding of where everyone fits has been demonstrable. In all appraisals, our four objectives were matched with appropriate objectives for that staff member and everyone had to complete an extended development plan that included how they would measure success and how they would know they were successful. Staff can see their value and their impact as well as being much more confident in representing the scope of the LDC work. We can also truly say we are evidence-based practitioners, in all senses of the phrase.

Coffee in the future?

We’re still learning and constantly re-evaluating and re-assessing our measurement systems. Over the next few months we will be undergoing a strategic planning exercise as part of our new University vision which will include creating meaningful evaluations and success measures. As a team we are much more confident that we can do this successfully.

We need to marry the perhaps insular nature, or better still ensure our measuring does not become too insular, with that drive to collect examples, case stories and data. We need to continue to resist a culture that is mechanistic in terms of measurement and just measure for measurement's sake but we need to remain mindful of our obligations or requirements to provide evidence for the value of our work, in ways which are required by others but is still in line with our values. By sharing our evidence we will be able to improve the work of others as well as continue to improve our own work. We need to still trust our gut instinct – measurement data may not give us the entire picture – and is only one way of supporting our work. Although we can continue to question and interrogate we can feel more motivated and confident in our work and our abilities if we know we can demonstrate that we are giving value and making a difference. None of this will make us immune from budgetary cuts and efficiency measures but will make us more agile and give us a deeper understanding of where we truly add value. And ultimately that is all any of us can hope for.

Acknowledgements

Lesley Salem from Cultivation - www.cultivation.uk.com/contact.html - who worked with us on the initial KPIs at City. Dr Antonia Ward who helped me think about impact and put me onto the fabulous Lego timesheets.

References

The Australian Learning and Teaching Council (2010) *National Teaching Quality Indicators Project (2007–2009)*. Available at http://www.catl.uwa.edu.au/projects/tqi

Baume, D (2010) 'How do academic developers make an impact – and how do they know they have done?' *SEDA Conference Presentation 2010*

Baume, D. (2008) 'A toolkit for evaluating educational development ventures'. *Educational Developments.* 9: 1-7. Available at http://www.seda.ac.uk/resources/files/publications_109_Educational%20Dev%209.4.pdf

Kirkpatrick, D. L. (1994) *Evaluating Training Programs: The four levels*. Berrett-Koehler: San Francisco

LDC (2010) *Critical Success Factors* Report. Available at http://www.city.ac.uk/about/education/ldc/about-us/csf-report

Taylor, D (2008) *Lego Blocks at Time Trackers.* Available at
http://blog.tsheets.com/2008/business-help/lego-blocks-as-time-trackers.html