Learning and Development conversations for managers

One of the most common concerns among reviewers is how to manage the expectations of reviewees in relation to learning and development requests. It probably comes as no surprise to hear that the staff experience survey indicates that having learning and development needs fulfilled is a key factor for reviewees. As managers, how can we manage expectations while working within our budgets and workload commitments? Here are some ideas to help you.

1  **Routine communications with your team**

If budgets are limited, headcount is fixed and there are absolute commitments that have to be met, we can make things easier for ourselves and our teams when we are clear about all of these boundaries in our routine communications. In regular team meetings and one to one conversations, we can be honest with our people about the current situation. That doesn’t mean we have to be mean spirited about training: we can be honest, yet still open to thinking creatively about learning and development needs and how to fill them.

2  **Planning development at the department/faculty level before you start a PDR cycle**

Before you start a PDR cycle, it can be helpful at the department/faculty level to look ahead and consider where your learning and development priorities are. You might know, for example, that a new piece of software or a new procedure is coming your way. Perhaps you have a number of new colleagues who all need to learn how to organise a symposium with you. Or you may have decided as a department that you need to enhance your confidence in creating an inclusive environment. As a department or faculty you can plan how you will put that support in place. Reviewers can take that knowledge into PDR conversations with them so that they are clear on what is already on offer. You could also take a look at what is provided by the University’s training providers (OLI, IT, Finance etc.) so that you are prepared to discuss options. Your reviewee may suggest some learning needs in their meeting preparation form (part one of the PDR form) or you may have some thoughts yourself. Some learning needs will emerge during the discussion so it’s a good idea to be prepared.

3  **Wants vs needs**

Your primary responsibility as a reviewer in terms of learning and development is to ensure that your people have the skills they need to do the job they are required to perform. What is aspirational is a separate discussion that may be more to do with career progression. Reviewees may bring both to their PDR. Your role is to distinguish the needs from the wants and make sure you focus on the needs first. If a learning and development request relates to a career aspiration/career progression, you may find it helpful to look at our career conversations for managers skills guide.

Learning and development wants can come in many guises. Sometimes these are practical to support. There may, however, be good reasons why what your reviewer wants isn’t feasible. Time, budget, whether or not the learning solution proposed is the best fit and the fact that there may be higher priorities for development for the department are just some of them. Having said that, we can be creative about finding effective, low cost, close to home learning solutions.

4  **Best fit solutions to learning and development needs**

In The Career Architect Development Planner, Eichinger and Lombardo argue that, for managers, 70% of the most impactful learning happens on the job (testing, practising, observing listening), 20% happens in social situation, formal and informal and only 10% happens in structured learning such

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**Skills Guide**

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**Oxford Learning Institute**
as course. There is a place for courses, but there are many other valuable opportunities for learning available to us. This 70:20:10 principle has relevance to all of us.

Learning solutions could include: work shadowing, secondments, serving on committees, coaching, job rotation, visits to other workplaces, project work or volunteering. You may find it helpful to look at our developing yourself resources and suggest that your reviewee do the same.

Choosing the best fit solution isn’t always easy. Here are some ideas to help you:

- Start by defining what needs to be learned. This sounds temptingly easy but in fact it’s the activity that needs the most energy and precision. If you aren’t clear on what skill or behaviour needs to be developed and what good looks like, the chances of the learning solution being effective are very low
- You may find it helpful to start by describing what will be happening when this new skill or approach has been learned and is being practised with fluency
- What’s the priority? And the budget? Are there any other constraints (reviewee’s availability for example?)
- Now what will be the best fit solution?

5 Embedding learning

Once you have agreed what needs to be learned and how that learning will be supported, make sure you agree who will organise what. It’s easy for each of you to leave the meeting, both convinced that the other is going to take a particular action. If you don’t have a learning and development plan as part of your PDR form, then you may find it helpful to look at this sample. This prompts you to specify, what, by whom, by when and how you will know that the learning has been successful.

Reviewees will need support from you before and after they learn. Colquitt and LePine¹ argue that learning that happens without support is unlikely to be put into practice consistently. Most of us know that we have been on a course that was interesting at the time, but which has since faded from our consciousness. One of the key reasons is that we weren’t actively encouraged to implement our learning. Learners are likely to go through these stages as they develop and will need different types of input at each stage:

1. Unconscious incompetence (this is the point before we know we need to learn something)
2. Conscious incompetence (recognising that we need to learn)
3. Conscious competence (having to concentrate on doing something new- like driving a car)
4. Unconscious competence (using the skills with fluency)

5 Strategic learning and development review at the department/faculty level

When you have finished the PDR cycle, it can be helpful to review the learning and development themes emerging from PDR conversations. You may, for example, discover that, across the department or faculty, there is a need for process review skills or for implicit bias training.

When set alongside staff experience survey outcomes this can inform your learning and development thinking and planning for the coming year.