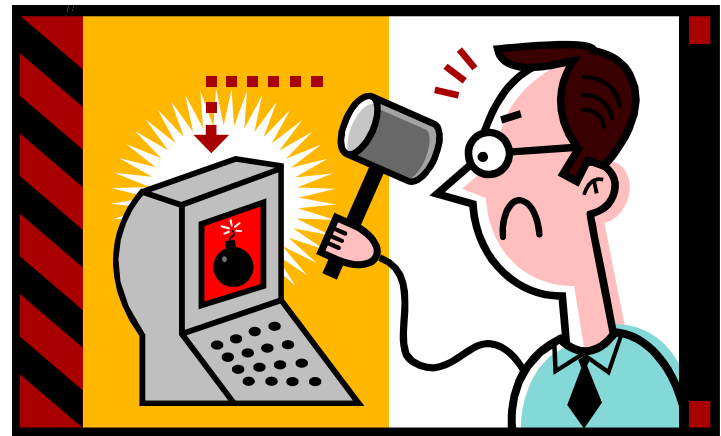# *Learning Portfolios as a Catalyst for Self-Development*

Presenters:

Michael Ingerick, Shonna Waters, and Joy Oliver
Human Resources Research Organization (HumRRO)

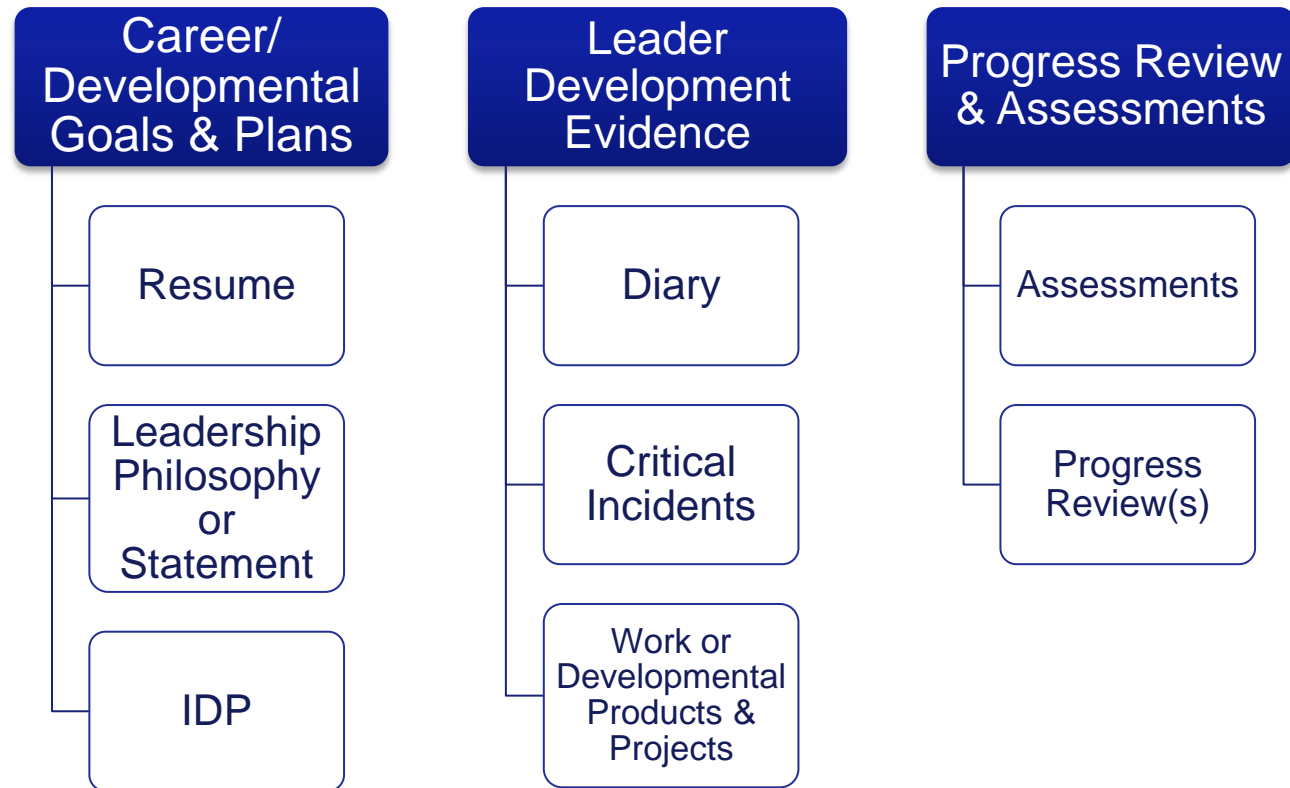*July 19, 2011*

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Learning Portfolios:
A Crash Course

What is a Leader Learning Portfolio?

➢ Portal consisting of information or materials collected for or on a leader, typically administered and managed on-line.

Career/ Developmental Goals & Plans	Leader Development Evidence	Progress Review & Assessments
Resume	Diary	Assessments
Leadership Philosophy or Statement	Critical Incidents	Progress Review(s)
IDP	Work or Developmental Products & Projects	

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Why are Portfolios Used?

➢ To facilitate leader development, as part of a formal development program or as part of self-development.

Individual	Team	Cadre

➢ To collect assessment information or data for:
  - ➢ Determining potential or readiness for development to entry-level or more senior leadership positions;
  - ➢ Determining promotion to more senior leadership positions;
  - ➢ Providing feedback on performance or proficiency as part of a formal development program (or initiative) or a self-development process;
  - ➢ Determining completion of a formal development program (or initiative) or its constituent components; or
  - ➢ Evaluating the effectiveness of a formal development program (or initiative) or its constituent components.

Person	Component/Course	Program

➢ In sum, multi-purposed and, serving potentially conflicting purposes (not unlike 360 or multisource assessments).

4

Why Have a Portfolio?

Fundamental (Unstated) Assumptions About Leader Development

- Leader development in today's organizations is self-directed, to some degree.
- Leader development does not follow a perfectly sequential, "one size fits all" process.
- Perceived relevance (organizational or individual) of leader developmental experiences is vital.
- Much leader development takes place on-the-job or preferably on an "as needed" basis.
- Leader development is enhanced when its is shared or collaborative.
- Leader "development" is more than competency or skill development (e.g., giving up strengths, adding new strengths, correcting flaws).
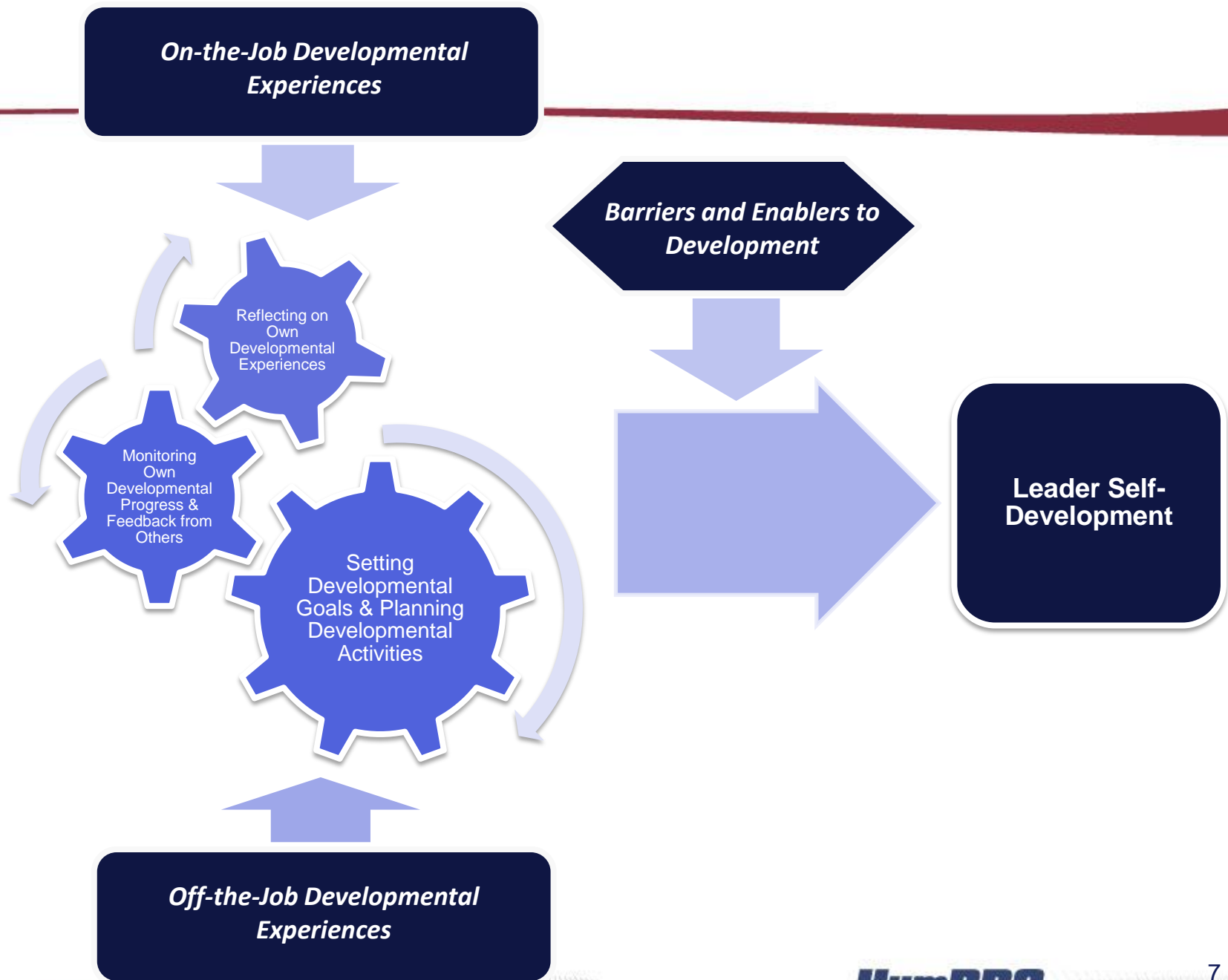- Leader assessments are most informative when captured *in situ*.

What Portfolios Do

- Provide structure to self-directed learning.
- Enable customization to meet individual needs.
- Afford opportunities to reflect on or reinforce the relevance of developmental experiences.
- Help support on-the-job learning and on an "as needed" basis.
- Promote or afford opportunities for shared or collaborative learning.
- Help promote a more expansive view of leader development (e.g., leader role identity).
- Provide a platform for capturing assessment information or data in situ.

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Learning Portfolios as Catalysts for Self-Development:

Key Drivers and Commonly Overlooked (or Ignored) Design Considerations Based on "Best Practices"

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On-the-Job Developmental Experiences

Barriers and Enablers to Development

Reflecting on Own Developmental Experiences

Monitoring Own Developmental Progress & Feedback from Others

Setting Developmental Goals & Planning Developmental Activities

Leader Self-Development

Off-the-Job Developmental Experiences

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Key Drivers and Commonly Overlooked (or Ignored) Design Considerations

Facilitating Developmental Goal Setting and Planning

- ***What kinds of goals or whose goals should participants set (e.g., cascading goals, SMART goals)?***
  - Place equal or greater emphasis on *within*-person linkages among goals and broaden goal-setting beyond exclusive competency-focus (e.g., linking participants' developmental goals to his/her career goals, linking goals to experiences, key relationships, etc.).

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Leader Development:
An Expanded View

Challenges	Experiences	Competencies	Key Relationships	Derailers
• Set vision and build toward the future • Balance trade-offs between the short and long-term • Align organization for strategy implementation	• Start-up business • Sustaining business • Corporate staff role • Sales/ marketing role • Global experience	• Strategic thinking • Building organizations • Technical expertise • Business acumen • Drive for results	• Senior executives • Key customers • Key suppliers • Board of directors • Government relations • Union relations • Community relations • Mentor/ champion	• Cautious • Bold • Mischievous

Adapted from Yost & Plunkett (2010)

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Facilitating Developmental Goal Setting and Planning

- ***How best to match participants to developmental experiences (or opportunities)?***
  - "Good" developmental goal-setting and planning starts with knowing oneself. Administer assessment tools to assist participants in identifying which developmental experiences best match their needs and so on.

- ***How best to structure a participant's IDP? This is seldom the most critical question…***
  - Expand developmental planning to include realistic previews of requirements and efforts to identify potential distractions and derailers up front (accompanied by suggestions on how best to handle them).

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Learning Diagnostic Questionnaire (LDQ): An Example

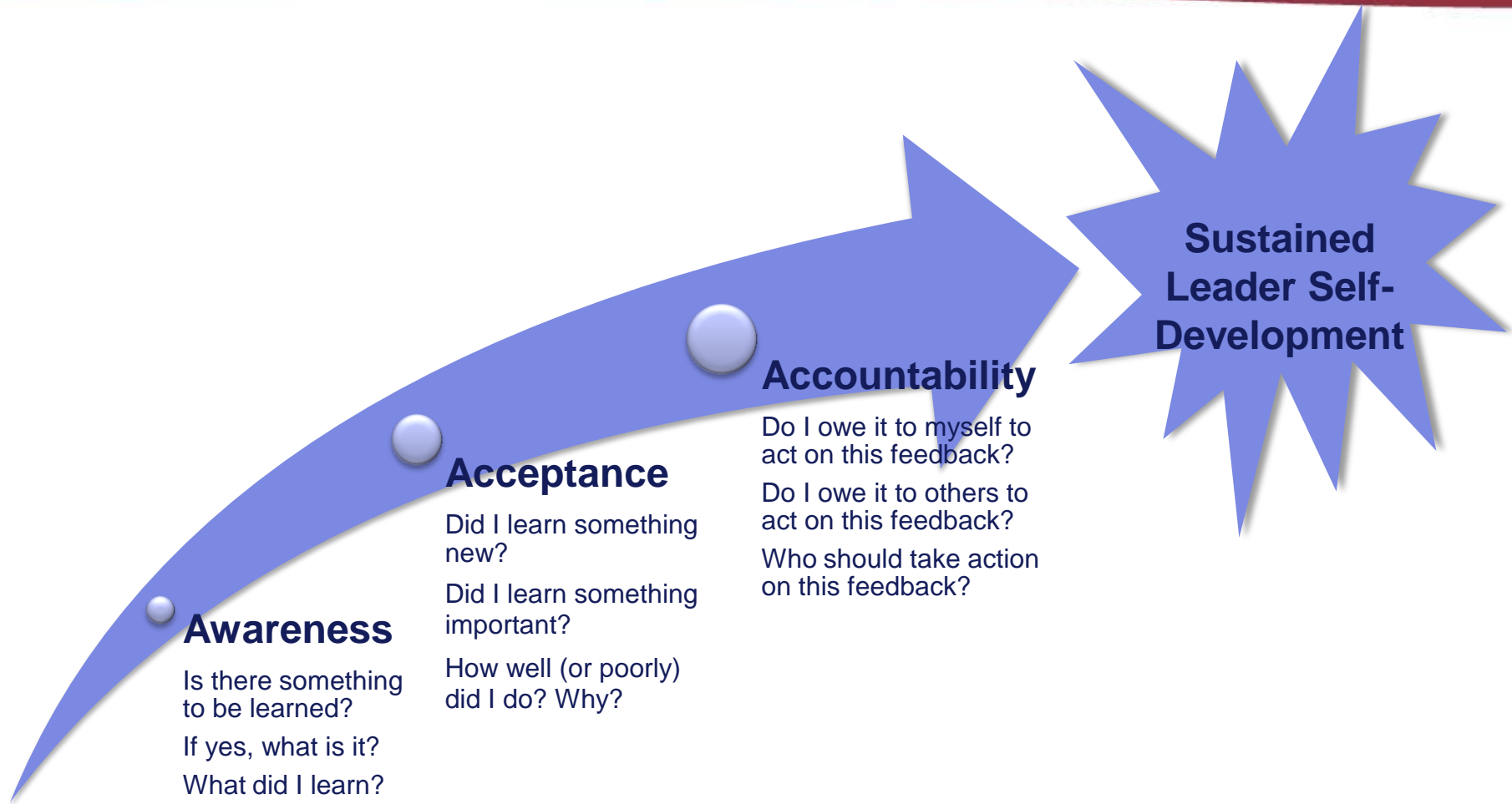|	Select the statement that best describes you or your organization.	
1	I often take time to review my experiences.	I rarely find time to review my experiences.
2	In my organization there is a systematic process for identifying development needs.	In my organization the identification of development needs is rather haphazard.
3	I believe that my boss is mainly responsible for my development.	I believe that I am mainly responsible for my own development.
4	I can describe the steps I need to go through in order to maximize my learning from experience.	I undoubtedly learn from experience but cannot describe the process I need to go through to improve the way I do it.
5	My current job is relatively static, i.e., the responsibilities stay about the same.	My current job has expanded to include additional responsibilities.

© Campaign for Learning (*http://www.campaign-for-learning.org.uk/surveys/ldq_start.asp*)

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Facilitating Monitoring Own Developmental Progress and Obtaining Feedback from Others

- ***What should one measure when monitoring or evaluating participants' developmental progress?***
  - What's beyond competencies? Plenty… Expand measures to encompass other elements of leader development beyond competencies or skills (e.g., career motivation).

- ***How to best measure participants' developmental progress?***
  - Psychometrics are but one of many factors to consider. All other factors being equal, the most critical factors are: (a) awareness; (b) acceptance; and (c) accountability.

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Sustained Leader Self-Development

Accountability

Do I owe it to myself to act on this feedback?

Do I owe it to others to act on this feedback?

Who should take action on this feedback?

Acceptance

Did I learn something new?

Did I learn something important?

How well (or poorly) did I do? Why?

Awareness

Is there something to be learned?

If yes, what is it?

What did I learn?

Adapted from Bracken & Rose (2011)

Facilitating Monitoring Own Developmental Progress and Obtaining Feedback from Others

- ***What kinds of feedback should participants receive? For what purpose?***
  - Soliciting and obtaining feedback is more than an assessment opportunity for gauging participant growth. It also represents a developmental opportunity in its own right (e.g., for diagnosing what the participant is doing right AND doing wrong and *why*).

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Diagnostic Checklist: An Example
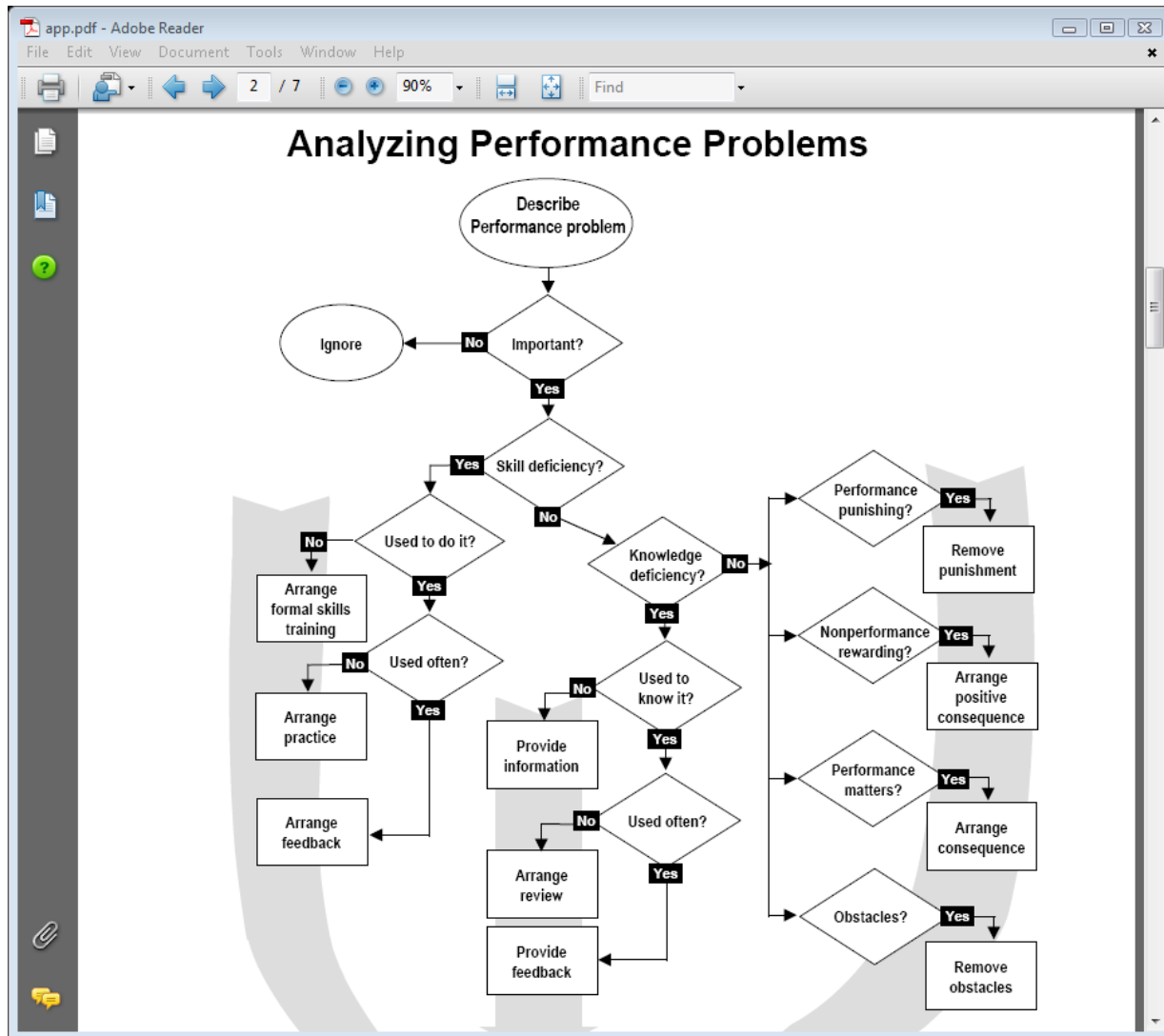
Causal Chain Analysis: An Example
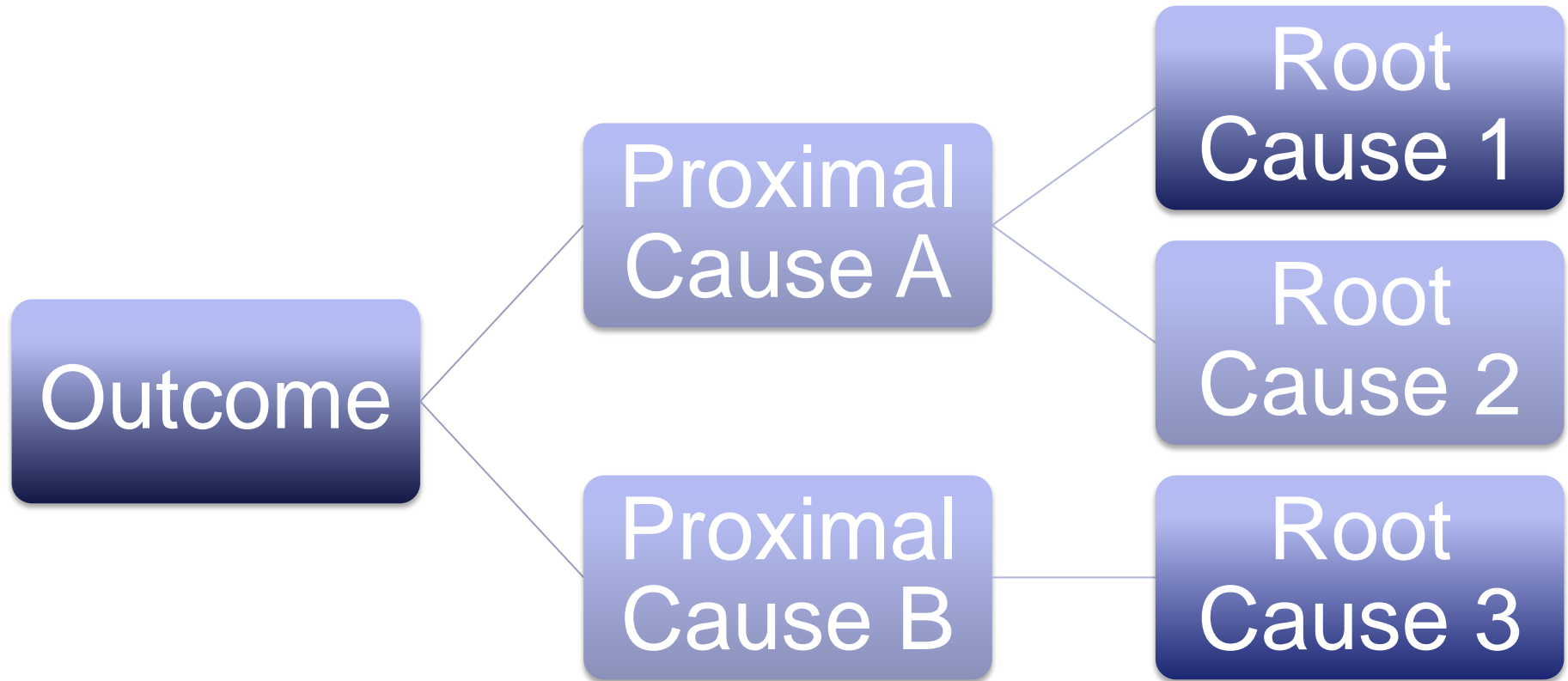
Key Drivers and Design Principles *(cont'd)*

Facilitating Reflection on Developmental Experiences

- ***How best to encourage participant self-reflection?***
  - Much of development is a matter of attention and the way developmental experiences are framed. Ask simple questions *frequently* (e.g., every two weeks) and hold participants *accountable* for reflecting on their learning and integrating lessons learned into their leadership repertoire.

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Thank You