ABSTRACT

Performance review of supervised staff involves reflective practice. As a genuine strategy to facilitate lifelong learning, reflective practices can incorporate a futures orientation in order to assess, plan, and implement improvements to an individual’s near- and far-future life, learning goals, and workplace performance. This can all be achieved within formal and informal mechanisms for reviewing and reporting on previous performance and planning for the immediate future workload and, where necessary, mechanisms for managing performance improvement can be introduced. Inherently, the short term nature of formalised performance review mechanisms do not facilitate good lifelong learning practice. It is through the more dynamic process of using a range of futures tools that formalised performance review mechanisms can promote a dialogue to explore the diverse potential of meeting current and near-future individual and organizational goals. This can be accomplished by understanding the past-present-future continuum; the nature of the plurality of the future – preferred, plausible, probable, or possible; and the exploration of the manner in which to achieve convergence to an achievable future. In this manner the incorporation of a futures orientation provides greater opportunity for staff and supervisor to explore and articulate organizational and individual goals and how to go about achieving them.

INTRODUCTION

Zuboff (1998) depicts well how learning is becoming integrated into our everyday work activities:

The informated organization is a learning institution, and one of its principle purposes is the expansion of knowledge – not knowledge for its own sake (as in academic pursuit), but knowledge that comes to reside at the core of what it means to be productive. Learning is no longer a separate activity that occurs either before one enters the workplace or in remote classroom settings. Nor is it an activity reserved for a managerial group. The behaviors that define learning and the behaviors that define being productive are one and the same. Learning is not something that requires time out from being engaged in productive activity; learning is the heart of productive activity.

To put it simply, learning is the new form of labor. (p. 395)

In supporting the notion that “learning is the new form of labor” Butler (2000, p. 329) uses the descriptor “worker-learner-citizen”, which is apt in highlighting the multiplicity of an individual’s role while operating as human capital contributing their intellectual capital in a knowledge economy or learning economy. Roberts (1998, p. 28) contends that “intellectual capital” is rapidly becoming “intellectual assets”.

Shon (1983) believes knowledge is embedded in professional work and that professional knowledge not only needs to be open but also subject to “real-time critical reflection by the practitioner as well as to public demonstration and examination”. Formal and informal performance review processes provide self (individual staff member or line supervisor), private (between an individual and his or her line supervisor, faculty, or university) and public (between an individual and peers, supervisor, faculty, or university) scrutiny of how well negotiated individual and organizational goals and plans have been achieved. As a manager, in particular, as in the author’s case, as a Head of School (HOS), to provide the appropriate environment for inducing change, as a consequence of or precursor to the process of a staff member’s performance review, the use of coercive power, reward power, and connection power may need to be involved (Hersey, Blanchard, and Johnson, 2001, pp. 216-217). The HOS will move in and out of many roles or what Lippitt and Lippitt (as cited in Allen, 2003, p. 32-35) call “spheres of influence”.

The emergence of futures studies (Slaughter (1993, 1995a, 1995b, 1996a, 1996b)) provides scope for redefining – or at least providing more creative and expansive ways in which to critically think about – models for operating
within an informed mindset that acknowledges our biases and allows us to realise that we all contribute to the future that we will ultimately arrive at. A lifelong learning perspective serves to emphasise and support the acquisition of a fundamental skills base that can be applied in a futures orientation to equip people with the ability to demonstrate critical thinking, reflective practice, and an acknowledgement of one’s role and responsibilities as an individual and as a member of a diverse number of groups, and to embrace the love of learning and the strategies and mechanisms by which to access, interpret, and use knowledge.

LIFELONG LEARNING PRACTICES
A lifelong learner should possess and action their learning via the following mindset, avenues, and attributes (Hager (1995), Brown (2000), Kearns (2004)):

- Possess an inquiring mind: love of learning, critical perspective, reflective practice.
- ‘Helicopter’ vision: ability to understand interconnectedness of fields, appreciate how knowledge is created, limitations of knowledge, breadth of vision.
- Information literacy: ability to locate, retrieve, decode (written, statistical, graphical, tabular), evaluate, manage and use information in a range of contexts.
- Sense of personal agency: positive concept of oneself as capable and autonomous in an individual context and also as a group member, self-organisational skills (e.g., time management, goal setting).
- Repertoire of learning skills: knowledge of one’s preferred learning style, understanding and ability to instigate a range of learning strategies and appreciate differences between surface and deep learning.

Collectively, the modes of learning can be diverse (Fischer 1999, p. 4; Livingstone 1998; Pilotti and Sedita 2005, p. 9): self-directed learning, learning on demand, informal learning, and collaborative or organizational learning.

FUTURES STUDIES AND FUTURES THINKING
Futures studies processes, methodologies, and tools that allow the consideration and conceptualisation of different futures are extremely important generic skills that individuals, managers, and organizations should be developing. Consequently, explorations of the variety of possible, preferable, probable, and plausible sustainable futures is an important aspect of strategic planning (including financial, human resource, emergent markets, and adapting and adopting technologies); managerial processes (supervision, targets, and direction); and reflective practice (individuals, managers, and organization). The lifelong learning characteristics which incorporate the aspects previously outlined resonate well as the basis of a skills set – a lexicon – to support and articulate a futures perspective. In establishing a futures dialogue, such lifelong learning characteristics underpin and inform the actioning of futures studies processes, methodologies, and tools.

INSTIGATING FUTURES STUDIES AND LIFELONG LEARNING PRACTICES TO INFORM PRACTICE
I held the position of HOS of the school of Industrial Ecology and the Built Environment (SIEBE), from May 2002 to May 2005 in the Faculty of Engineering and Physical Systems before taking up my current position of Program Director of Postgraduate Programs. As of January 2006, this faculty transformed from overseeing the disciplines of Engineering (Mechanical, Civil, Electrical, Maintenance, and Process); Physics and Building (Construction Management, Building Design, and Building Surveying); and Environmental Management to become the Faculty of Sciences, Engineering and Health.

As SIEBE staff are supervised across three campuses on the eastern seaboard of Australia, a number of communication and community promoting mechanisms needed to be employed to facilitate their management, provide cohesion, and enable staff avenues to contribute to the school’s function and direction. Campus visits, equitable access to learning opportunities,
and bringing all staff together at one physical location (SIEBE “Dialogue Days”) – or via teleconferencing (“Friday Forum” meetings) – were adopted. SIEBE Dialogue Days are issue-focused events that are conducted off-campus and last at least two days. As many as possible of the staff stay overnight and interact over a continuous 48-hour period. SIEBE Friday Forum meetings are informal weekly gatherings where staff reflect upon their past week and discuss forthcoming week activities and responsibilities. Discussion also takes place on how past issues were resolved, and new issues are explored through various interaction strategies. From their participation in such activities, staff have demonstrated their abilities to acknowledge, exercise, and further develop the mindset, avenues, and attributes of a critical lifelong learner.

Such mechanisms enable comparative and reflective interactions, enabling an exploration of continuities (in a past-present-future framework) and the plurality of futures (preferred, plausible, probable, and possible) fostering and supporting a learning organization philosophy. Such interactions are based upon equitable engagement between all members of the group (individual, peers, and managers). The environment is safe from favour or recriminations and the group adopt a “candid but polite” – or what Kant describes as Sapere Aude! (dare to know)-attitude which leads to an air of lively reasoning. It is through such a framework that we can honestly facilitate a dialogue that helps to ascertain our past, present, and futures (preferred and probable, plausible and possible) and the influences, importance factors, challenges (internal and external), and consequences that are required to critique, plan, and implement them.

Initially, there was wide distrust, poor communication and low morale within the school. To identify and clarify the need for change within the practices, and to address the apparent levels of despondency, a diagnostic contract (intended to build a diagnostic relationship) between HOS and stakeholders was outlined and presented to the Dean of the Faculty (Cummings and Worley, 2001, pp. 112-114) in order to keep everyone fully informed. Garrick and Clegg (2000, p. 3) explains that an “implicit managerial expectation is that staff will avail themselves of the new offerings to develop themselves; if they do not, they may have to accept the responsibility for their own professional demise”. Their assertion resonates with outcomes observed in implementing change management processes which focused upon performance review, reflective practice, community development within the school, and wider (external) community engagement, open and transparent communication, and equitable learning opportunities. The faculty has moved from a traditional linear hierarchical management structure to a matrix management structure with staff reporting to a number of managers, and with the HOS as their primary line supervisor responsible for signoff on their workload allocation, performance review, and professional development.

In my practices as a HOS, I have been influenced by the area of futures studies (in particular, Slaughter (1993, 1995a, 1995b, 1996 a, 1996b)) and strategically chose to instigate the development of a working environment which would support a futures orientation and a futures dialogue. This correlated well with what Rubin (2002) highlights as being what are termed “megatrends” in futures studies: areas of change having an immense influence on learning and education. This connects well with concepts, structures, and practices of a learning society, a learning organization, and lifelong learning as demonstrating the centrality of learning in economic development, goal-setting, and everyday life (Castells, 1996, 1997, 1998; and Guile as cited in Rubin 2002, p. 3). Rubin (2002, p. 3) contends that the pace of change and technological advancements has witnessed the emergence of a learning culture “which expands itself both horizontally and vertically throughout life”, leading to a dynamic approach to lifelong and life-wide learning that encompasses psychological, social, physical, and ethical dimensions. As a consequence, Drake (as cited in Rubin, 2002, p. 3) insists learning must address the whole person in preparing them for life in order to guarantee the opportunity for the emergence of an individual’s personality and for them to develop the necessary skills to operate in the future. Butler’s (2000, p. 329) worker-learner-citizen descriptor sits well with a futures perspective (of a plurality of futures from differing perspectives) which highlights the necessity to support the attainment of the lifelong learning characteristic of a sense of personal agency, thus supporting the importance of Drake’s (as cited in Rubin, 2002, p. 3) assertion of providing learning for the development of the whole person in order for people to function and prosper in a future they have some part in defining.

The various mechanisms instigated within the school for formal and informal performance
reviews constitutes a continuous form of performance review as opposed to the single, annual performance review process. It serves to allow staff a greater voice in formulating and realising individual, group, school, faculty, and university strategic goals (inducing a plurality of futures) and enabling a functionality based upon collegiality, collaboration, and consultation. This creates a greater sense of ownership of school operations and a manner in which to explore, highlight, contribute, and influence school and faculty decision-making processes and operational and strategic decisions.

Futures studies and the adoption of a futures orientation fits well with the inherent notions and characteristics of lifelong learning and lifewide learning. Noe, Hollenbeck, Gerhart, and Wright (2003, p. 377) refer to development as pertaining to “formal education, job experiences, relationships, and assessment of personality and abilities that employees prepare for the future” and highlight that the emphasis placed upon training is to enable staff to better accomplish their current job. Noe et al. (2003, p. 377) consider development as future orientated because it is “not necessarily related to an employee’s current job”, and training as improving the employee’s performance in their current position. However, they do concede that the purpose of training has shifted to a more strategic perspective and so, they believe, the definition between development and training will blur.

In my role as Program Director and HOS, a team approach has been adopted that closely matches Doorewaard, Van Hootegem, and Huys, (2002, p. 357) model of “shared responsibility teams”. Thus, training and staff development is embedded in their daily work tasks and contribute to the commencement of the development of a learning organization or the movement to at least a “culture of learning”. It also has the advantage that, with diligence, encouragement, and careful planning of workloads on my part, coaching and mentoring has occurred within the group structure without the need for too much hierarchical structure or formality being involved. In this way, the staff members consider the process more of a natural extension of working within a group framework than perceiving it as an added and onerous interaction, and they interpret it as a valuable learning experience that could be considered as a form of informal training or staff development.

To genuinely facilitate lifelong learning, the reflective practice process – while reviewing and reporting on previous performance and planning for the immediate future workload and, where necessary, performance improvement – must incorporate a more futures orientation in assessing, planning, and implementing changes and improvements to an individual’s near- and far-future life, learning goals, and workplace performance. Mechanisms in the formal performance review process, formulated for SIEBE, involved having staff complete a performance review document which had a past-present-future continuum format and which, in particular, asked staff to contemplate their near future (next five years) in the categories academics are assessed upon (teaching, research, governance, and community engagement). This document was used as the basis for a discussion between staff members and the HOS, and guided them in completing the formal documentation, and challenged staff to look beyond the one-year-previous to next-year performance review mechanism required by the university under its Enterprise Bargaining Agreement (Academics), (2005) (Central Queensland University, 2005). In this way, staff were provided with an opportunity to think more broadly about their career aspirations, their learning needs (for the near and far future) and how they may contemplate plausible, possible, probable, and preferred futures and the manner in which they may achieve their preferred futures – or how to converge their preferred and probable futures to their advantage. “Futures wheels” were also used as a mechanism for creative and lateral thinking so that staff were not locked into linear thinking processes but were challenged to look at “what if” scenarios and the effects of different internal and external influences and actions, and the consequences of inactivity and allowing the future take care of itself.

SIEBE members have been the direct instigators of defining and enacting the strategies and foci to achieve collective goals. This sits well with Rubin’s (2002, p. 6) idea of futures learning as it is based upon conceiving, developing, and implementing plans, policies, and actions from the point of view of supporting the staff’s “abilities and possibilities to act as developers, visionaries and initiators of change at their own organisations, communities, and society”. Consequently, Rubin (2002, p. 6) contends that the “future has to be studied as systematically and thoroughly as possible”. In designing and conducting learning experiences and reflective
practice activities, as a HOS, the elements of futures studies and the encouragement of a futures perspective have been dominate as guiding principles. As Fischer (1999, p. 11) notes the future of how we “live, think, create, work, learn and collaborate is not out there to be ‘discovered’ – it is to be invented and designed. Mindsets grounded in seeing learning as an important part of human lives will be an integral part of the future”. Gavigan et al. (as cited in Pilotti and Sedita (2005, p. 6) believes “knowledge substantially describes a state or potential for action and decision in a person, organization or group. Learning, instead, is a dynamic process, which indicates permanent changes in the state of knowledge, often manifested by a change in understanding, decision or action”. Through the processes and avenues provided to SIEBE members, learning has been apparent in establishing a cohesive, collaborative and productive group. Garrick and Clegg (2000, p. 2) explains that for “so-called knowledge workers, work is the curriculum”. Consequently, the manner in which learning at work is understood is critical in establishing successful learning practices. As academics working in an educational institution, we are interpreters of established knowledge and originators of new knowledge. This is achieved by drawing on our own learning, our professional work experiences, our peers’ experiences, interactions through teaching, research activities, and engagement with academic peers, industry practitioners, students, and colleagues.

Srikantham (n.d., p. 4) ponders whether universities can learn. In doing so he investigates the Bowden and Marton (1998) “university of learning” model, which coincides remarkably well with Senge’s (1992, pp. 6-9) model of a learning organization. Senge’s (1992, pp. 6-9) facets of a learning organization (personal mastery, systems thinking, team learning, shared vision, and mental modes) are achieved through the processes of open communication, consultation and collaborative approaches to assigning workloads and providing equitable learning experiences to staff. The process of active dialogue and reflective practice as undertaken through performance review processes and the Dialogue Days. As contended by Sachs (as cited in Fischer, 1999, p. 3), by integrating working and learning, people learn within the context of their work on real-world problems and, as such, learning is integrated into their work processes because learning does not occur in a separate phase in a separate location. In undertaking a formal performance review, academic staff are subjected to scrutiny of their performance under the categories of teaching, research, governance, and community service, as defined by the Enterprise Bargaining Agreement (Academics) (2005), (CQU, 2005).

CONCLUSION
In providing the environment for staff to contemplate their individual past-present-future continuum and how it forms part of an organization’s past-present-future continuum, it is important to provide them with continuous opportunities to undertake reflective practice through performance review. Reflective practice by its nature helps staff to holistically consider past-present-future continuums as the process involves reviewing the past and considering how they may, in the present, formulate and commence the enactment of strategies – through consideration of preferred, plausible, probable, and possible futures. Then the manner in which convergence of preferred and possible futures can occur to create the future, needs to explored. Formal and informal mechanisms help, but annual performance reviews, while necessary and important, are not the only mechanism by which to promote staff commitment and inventiveness. A continuous approach in which they participate and where their participation is valued brings more productive results. It is the development of the characteristics of lifelong learning in a futures studies framework which has provided success for the members of SIEBE.

REFERENCES


