The Centre for
**Recording
Achievement**

Welcome ...

Editorial

Rob Ward, Director, the Centre for Recording Achievement (CRA)

'Tis the season' runs the song, 'to be jolly'. My spirits were lifted recently when someone wrote to me that they had 'made some very good progress with embedding PDP in the curriculum in several Schools over the last few weeks. All of a sudden people seem much more responsive and even enthusiastic!!' And, while I have to be careful not to overdo it, it seems to me as though this edition of PDP-UK contains many reasons for enthusiasm, if not jollity.

The opening contribution from our good friend Norman Jackson brings in two of these from the start, namely a perspective on the 'PDP journey' – and how far we have travelled in this 'Cinderella' area of policy – and a clear vision as to the potential to provide a central contribution to the step-change of pedagogic practice in Higher Education. We look forward to future contributions from Norman in his new role. Then Dominic and Peter take us into practice; Dominic emphasising how we are now moving beyond 'early adopter' territory and Peter echoing Norman's point about the centrality of PDP to the core business of learning and teaching. His recognition of the need to 'build on reflection through modules' takes us effortlessly into Janet Striven's piece on 'supporting learning from reflection'. It's a core focus of ours, of course and there is plenty still to do here. Janet is taking this work forward, and information about opportunities for you to contribute is provided on page 5.

Finally, we have two contributions which take us into the electronic environment. As promised in issue 6, Anna Home provides a short but very readable guide to data protection issues; just the job for anyone outside the Law department. Finally, Darren Cambridge reminds us of the wider picture, confirming though his evaluation work the potential of e-portfolio practice to support lifelong and life-wide learning and development for all. More information on the exciting opportunity to get involved with Darren and other US colleagues in the National Coalition for Electronic Portfolio Research can be found on page 8, and the research and evaluation agenda will be a theme of future issues.

It's also a time of year for making resolutions …. so I hope you will take a moment to think about your resolutions for work with PDP for 2006. (Well crafted resolutions are only a pace or two away from SMART targets, after all!). One of these will be to provide feedback on your sense of key priorities to support development work in the 2006/7 academic year. You can do this – if you have not done so already - by completing the priorities form online at http://www.recordingachievement.org/downloads/PDPConsultation.doc . Please use this opportunity: it will only take a few minutes, and your professional judgement will enable us to produce a development and support programme which reflects your needs in very explicit and direct ways. Plus you can then 'tick it off' before New Year.

And – finally – a Happy Christmas to all our readers!

Towards the tipping point: an intensely personal view of Progress Files and PDP

By Norman Jackson, Director of the Surrey Centre for Excellence in Professional Training and Education

So often in life, good and unexpected things emerge through relationships that convey values as well as useful knowledge. I lost my 'virginity' to PDP in the Commonwealth Centre in 1998 thanks to Val Butcher. By this I mean that Val took me by the hand (as she is want to do from time to time) saying, 'come and meet Rob Ward'. Whereupon she dragged me, as well as anyone could on crutches, over to where Rob Ward was sitting and said, 'this is your man' (I'm not sure to whom!). But it doesn't matter, for in that fateful moment I became a member of 'family CRA' and through the enthusiasm, energy, commitment and experiential knowledge of 'the family' I came to see the world differently, and through this changed perspective, altered my view about learning and higher education.

At the time the Dearing recommendation for a Progress File, the Cinderella of the massive array of policy ideas emanating from Higher Education Quality Committee's (HEQC), Graduate Standards Project, had been 'parked': more accurately, nothing had happened in the 18 months since the great man had pronounced. Having worked on the idea of programme profiling at HEQC I picked up responsibility for developing the idea of programme specifications when I joined QAA. But I realised that we also had to develop the progress file simultaneously if we were to get any sort of alignment and connectivity between policies.

So, with a lot of help from my friends in CRA and the blessing of what was then the Committee of Vice-Chancellors and Principals, I picked up the ball and ran. What emerged from the messiness of conversation and consultation was, I believe, a policy that is more or less workable and flexible enough to accommodate the variety of approaches that institutions believe are appropriate for the educational experiences they provide and for the sorts of potential they want to develop. It's a belief that seems to be endorsed by participants in the four network events held earlier this year.

I have always believed that PDP was the most important agent for change in the whole of the Dearing proposals simply because it puts a student's own identity and development at the heart of the educational process and forces teachers and institutions to recognise this. Since then, I have developed my own understanding of what 'development' means to embrace a range of abilities and attitudes, for example: *analytical abilities* – to analyse, evaluate, judge, compare and contrast; *practical abilities* – to apply, utilise, implement and activate; and *creative abilities* – to imagine, explore, synthesise, connect, discover, invent and adapt. But these abilities and attitudes need, themselves, to be set within the abilities to plan and reflect so as to know in what direction to travel and to make sense of the experience and the effects of doing something. Successful people do not necessarily have strengths in all areas, but they find ways to exploit whatever pattern of abilities they may have in any given situation or context.

PDP is, I believe, helping to transform the higher education curriculum from one that is still primarily geared to the transmission of knowledge and the utilisation of that knowledge to one where self-identity – knowing self and knowing how to develop and keep developing self, are also important. When the specialist knowledge we acquire through a higher education becomes redundant, all we are left with is our capacity to learn and to keep learning in whatever context we find ourselves. This has to be the key skill for life that higher education equips us with and it is the one that PDP serves.

As a higher education system, we have come a long way from the apple in Sir Ron's eye. Five years on, thanks to the creativity, determination and graft of many committed individuals, most if not all institutions are slowly but surely introducing some form of process or processes that seek to connect and draw benefit from planning – acting – self-observing – recording – reflecting – critically evaluating. While we might be critical of the progress we have made at the microscale, as a system we have made fantastic progress towards what I believe will be a tipping point – the tipping point where an idea or practice reaches a critical mass of understanding and tips the culture into a new direction.

But we are not there yet and system-wide cultural change on the scale we are trying to promote takes ten years or even a generation to accomplish rather than the five we gave ourselves. My biggest fear is that we will regress from the ideals that have shaped what has been achieved so far. That under pressure from Government – with its unquenchable thirst for standardised and ever more explicit information about things that just cannot be codified in simple

ways – higher education institutions may be 'encouraged' to 'reform' the Progress File, so that it produces the standard pieces of paper 'that employers want' – so we are told. This, rather than the thing that employers really want, which is people who can communicate in purposeful, subtle and meaningful ways and give them the information they need in forms that they can understand and use.

But I'm an optimist and do not dwell too long on such pessimistic thoughts. Make no mistake, we are leading the world in our thinking and practice and in the last few weeks well-respected and influential commentators from both Japan and the USA have told me so. The Progress File is an imaginative and creative solution to the difficult problem of how we represent and communicate students' learning and achievements to a world that values both disciplinary and trans-disciplinary forms of learning and problem working capability. The Progress File, which combines different forms of information about students' learning and achievements with enhanced self-awareness and capacities for communicating learning and achievements, is the right sort of solution for this problem. And everyone who engages in PDP is helping to tip us into a new and better world.

Quick Start PDP: Meeting the 2005/06 Deadline

By Dominic Micklewright, Lecturer, Centre for Sports and Exercise Science, Department of Biological Sciences, University of Essex

In May 2000, the Progress File Implementation Group (PFIG) set a deadline of 2005/06 for Higher Education Institutions (HEIs) to establish Personal Development Planning (PDP) programmes. Nevertheless, many HEIs have yet to meet this deadline. I will describe the method I used to develop a quick-start PDP programme and discuss some of the key difficulties I encountered. This account is intended help inform those HE practitioners charged with developing a PDP programme just in time for the 2005/06 deadline.

1. Developing a PDP framework

Developing a PDP framework was a useful process since it required careful consideration about the conceptual basis of the programme. The framework was underpinned by several broad objectives: i) encourage students to assess their personal development needs and plan their future accordingly; ii) encourage students to reflect upon how their university experience relates to transferable skills; iii) encourage students to review their needs and update their plans; and iv,) provide students with a means of managing and recording their personal development. Although

there is likely to be some variation between HEIs or faculties in their PDP concepts, one of the advantages of a framework is that it provides a degree of universality without compromising specific needs. Thus a carefully designed PDP framework ought to be able to accommodate the needs of a diverse range of students. The following PDP framework was developed for students within the Centre for Sports and Exercise Science at Essex University:

1. Curriculum Vitae (students maintain a CV which they are encouraged to regularly update).

2. Reflective Statement (broad reflection at the end of an academic year – helps inform 4).

3. PDP Portfolio Mapping (students map specific activities against general transferable skills).

4. Needs Analysis, Forward Planning, and Review of Planning.

5. Activity Critical Analysis (reflective statement about a specific activity).

6. Activity Log (log of all other personal development activities not included elsewhere).

2. Engaging students

Providing motivation and opportunity for students to engage with PDP was a critical point in developing this programme. Pre-participation education is an important method of increasing student motivation. The nature of PDP was therefore fully described and its benefits thoroughly explained. The disadvantage of non-participation was also brought to students' attention.

The intent to engage in PDP is only likely to result in actual participation if the necessary opportunities exist. A consistent and easily understood PDP framework provides this kind of environmental support. However, equally important is the way students are expected to record and manage their portfolios. At the time of developing this programme, portfolio management software was not available at the University of Essex. It was therefore necessary to utilize existing resources and, although not ideal, WebCT was used creatively as the online PDP

platform. Hard copy portfolios were also considered. Whichever method is used, care needs to be taken not to compromise student motivation with excessively complex or user-unfriendly portfolio systems.

PDP assessment, although a source of extrinsic motivation, does engender high rates of student participation. Increasing participation through added assessment may, however, be counter-productive in terms of promoting intrinsic motivation. In this programme PDP assessment was achieved by asking students to complete an activity critical analysis (PDP framework item 5) for selected components of the Sports Science programme that were already being assessed. Thus assessment was used as a method of integrating PDP into the existing degree scheme without really creating any extra work since students were required to submit an assessment anyway. The kind of assessment strategy is likely to vary according to the specific nature of a given PDP programme. Nevertheless, assessment ought to be used as a catalyst to promote a positive interaction between students' intrinsic motivation and actual participation.

3. Conclusion

PDP programmes can be developed in a relatively short period of time providing designers are prepared to use existing resources. The most economic method of designing a PDP programme is to develop a framework derived from a set of institution or faculty-specific needs. Engaging the student in the programme will depend upon the careful use of pre-participation education, assessment, and portfolio management.

PDP – Starting from where we are in Learning and Teaching terms

By Peter Lumsden, Teaching and Learning Co-ordinator, Faculty of Science, UCLAN

Even in a modular system, PDP – Personal Development Planning – can form the 'core' of any Learning and Teaching strategy. A useful analogy is that while the modules are the bricks of our wall of provision, PDP is the mortar which runs through and holds them together. However, an ongoing challenge is to engage staff. This article reviews the way in which PDP has been introduced and embedded in the Faculty of Science at UCLAN.

1. Faculty level – strategic

There is no overall Faculty 'model', as 'ownership' by Departments is critical, but I have identified the following elements to constitute the 'minimum' of what PDP 'involves', and therefore to feature in Departmental strategies.

- **Self-awareness** – strengths/areas to improve e.g. time management

- **Reflection** – undertake at appropriate junctures, e.g. end of year with personal tutor, built-in as criteria for selected assignments

- **Action planning** – a crucial part of implementing change, and a clear opportunity for discussion with the personal tutor

- **Team/group work** – able to recognise roles within a group and to contribute appropriately. This requires staff to set up opportunities, and be able to give guidance and feedback on 'performance'

- **Career planning** – market awareness, applications, presentations, interviews, CV construction.

A general model has been used as a starting point for discussion and development. To view, please click here and see figure 2:

http://www.uclan.ac.uk/facs/science/documents/landt/pdp.doc (accessed 30 November 2005).

2. Departmental level – designing-in PDP

My academic background has given me credibility with staff, and has allowed me to engage with departments. The following model for four steps in the process emerged from a meeting in Forensic Science.

a) Agreement of all staff of the value of overall of the process, and commitment to supporting it.

b) The basics – deliver to students essential details of approaches to study, learning styles, personality styles, study skills. A study skills module probably does this most effectively.

c) Build on reflection through modules. This is where most change is needed, with a need to articulate approaches in the 'learning and teaching strategy' section of module descriptions. We need to consider what the students are doing as well as what the tutor does!

d) Students actively engage in the process, building their progress file and/or CV.

3. Departmental level – delivery

Having a Departmental as well as a Faculty role, I have been able to 'guide' PDP developments within the School of Natural Resources. Across

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the School, a level one **study skills** module provides some basic training in/opportunities for self-analysis, and a reflective review assignment with an associated **action plan** formalises this. The marked assignment is returned to the **personal tutor**, who can use this as the basis for discussion during tutorial meetings. Group-based discussion around written feedback provides a further opportunity for **reflective practice**, and should 'feed-forward' to future assignments. **Career planning** is developed through annual workshops and an on-line careers module in which CV construction and presenting evidence of personal development features prominently. This generic framework has then been further customised by individual courses, for example Geography. To view, please click here and see figure 2:

http://www.uclan.ac.uk/facs/science/documents/landt/pdp.doc (accessed 30 November 2005).

Supporting learning from reflection

By Janet Strivens, Senior Associate Director, Centre for Recording Achievement

I had a meeting this week with a group of engineers who had asked me to help them think about how to assess the Personal Learning Journals which their students were keeping alongside their final year projects. Assessing students' reflective writing is still a very live issue despite our accumulating experience across the HE sector. Two years ago, the Centre for Recording Achievement ran a series of workshops called 'Supporting Learning from Reflection'. These were structured to help participants reach, inductively, a clearer understanding of their real purposes in setting reflective writing assignments. Practitioners brought samples of their students' work and shared their judgements in discussion with fellow practitioners. We provided a set of twelve criteria as a starter, asking participants to choose no more than three which applied to their task and to prioritise them: however, they were allowed to edit or add to the ones we suggested. As a result it, was hoped that they could give clearer, more explicit guidance to their students.

The workshops were very well received, judging by the evaluations, yet they were workshops without 'answers' as such. Many participants left copies of their students' work and an outline of their deliberations for me to analyse. I was interested in which criteria were chosen by the participants and whether there were any patterns. 'Awareness of own learning' proved the most popular, some way ahead of 'awareness of own weaknesses', but every one of the criteria we had

offered was chosen by some participants, with more added that we had not thought of.

Our approach emphasised the importance of different assessment criteria related to different purposes for reflective writing, but that isn't the only issue. Many staff, particularly if they use reflective assignments a lot in their programme (such as health care or education tutors) were equally concerned about **level**, or depth of reflection shown by students and whether this increases as their learning progresses. Again, depending on discipline, this might mean more integration of material, sharper analysis, more awareness of emotions, more implications for practice, more evidence of the practice itself or a synthesis of all the above.

The workshops were based on the assumption that clearer assessment criteria will help tutors write more useful guidance for students. Regarding the guidance itself, the most frequently cited methods were **questions** and **models**. Many tutors have devised sets of structured questions to guide students through a reflective process, with variation reflecting both different disciplinary goals and the level of the student. However, many participants believed that the best way to help students understand what they were looking for is to show them examples, either made up or taken from previous students' work. These can be short extracts rather than entire pieces. This approach raises some issues about copying (at least) and plagiarism (at worst) but many staff feel that models are essential for weaker students or students from different cultural backgrounds.

If you are willing to share materials which have worked for you, we'd be happy to put them on the CRA website for others to download. Send them to me at janet@recordingachievement.org with a bit of context about how you have used them. As a starter, there's one from me on page 9 at the end of this newsletter. It was devised for medical students starting on clinical placements. I shared this with the engineers to give them some ideas: they weren't too sure about questions starting 'How did you feel about . . .', but they quickly thought of other questions and they've gone away to devise something more suited to their own needs.

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Online PDP and Data Protection

By Anna Home, Centre for IT and Law, School of Law, University of Bristol

As Higher Education Institutions (HEIs) move from paper-based PDP to online PDP, increasing amounts of personal information about students are starting to build up in institutional databases. Additionally, HEIs are facing a rise in the electronic transfer of PDP data between themselves and other organisations, such as FE colleges, UCAS and HESA. These developments raise data protection issues that HEIs need to understand and address appropriately to comply with the Data Protection Act 1998 (DPA 1998).

HE staff implementing electronic PDP tools, and supporting students' PDP processes, usually have either a technological or pedagogic background, and so may be unprepared to deal with the legal implications. The good news is that tackling data protection issues relating to online PDP is relatively easy. A key element of a successful data protection strategy is to involve your institutional data protection officer (DPO) at the earliest possible stage. Here is a set of recommended steps to help ensure your institution processes and transfers PDP data correctly.

Set up a meeting with your DPO. As preparation for the meeting, read the guidance document 'Data Protection, Lifelong Learner Record Systems and e-Portfolios' which is available at: http://www.jisc.ac.uk/uploaded_documents/Data_Protection_FAQ.pdf (accessed 28 November 05) and note down answers to the following questions regarding your PDP system:

- Will students input and manage all the PDP data relating to them, or will data also be obtained from institutional student records systems, or from 3rd parties?

- From which 3rd parties will PDP data be received (e.g. FEIs, other HEIs, employers)?

- To which 3rd parties may PDP data be transferred (e.g. another HEI when a student transfers institution)?

- Who, apart from the student, will have access to elements of their PDP data?

- Who sets [gives?] the permissions for viewing or sharing PDP data, and how will these be enforced?

You will need to address the following questions with your DPO:

- Who is/are data controller(s) for the PDP data?

- If your institution is the data controller, does its notification to the Information Commissioner cover the processing of personal data for the purposes of the PDP system?

- Do the institution's existing means of informing students about the collection, use and distribution of their personal data cover such processing?

If your institution isn't the data controller for personal data held in the PDP system, the DPA 1998 won't apply, but you should discuss with the DPO what advice students using the system may need regarding the data protection implications of their own activities. If the system permits the transfer of personal data from or to 3rd parties, ask the DPO to help you identify the data protection risks, responsibilities and obligations involved, and how these could best be addressed. Addressing such issues may involve:

- undertaking a data protection mapping exercise;

- entering into formal agreements with relevant 3rd party or parties;

- ensuring that staff have clear and practical guidelines.

Taking these basic steps at the start will go a long way to preventing post-implementation data protection problems, although it's always a good idea to undertake a periodic review of practices and procedures just to keep everyone on their toes.

A US Perspective: Self-Directed Lifelong Learning with 'e-Folio Minnesota' through Facilitating Audience and Ownership.

By Darren Cambridge, George Mason University, USA

The 'e-Folio Minnesota' project is distinguished from most other electronic portfolio initiatives in the United States in one central respect. While most focus on the application of electronic portfolios within the context of a single academic institution or program, e-Folio Minnesota seeks to support lifelong and life-wide learning for all citizens of the State of Minnesota both within and beyond formal education. In this respect, it parallels UK initiatives such as Career Wales and the work in Nottingham using electronic portfolios at the transitions between levels of education and between formal education and the workplace.

Since its launch in the Fall of 2003, over 30,000 Minnesota residents have built electronic portfolios using the services provided by the 'e-Folio Minnesota program'. The Minnesota State Colleges and Universities (MnSCU), which runs the program, commissioned research in 2004 to systematically analyze the purposes for which these people are employing their portfolios and the reasons why they deem them successful or not successful. The research consisted of a survey of all users, and interviews with selected users whose survey responses were representative of patterns identified in the survey data. The focus was placed squarely on what individuals actually did and valued, not the intended outcomes of the program.

Some results from the survey were quite surprising. While we had expected that certain uses would emerge as most popular, all six categories of use – educational planning, documenting knowledge skills and abilities, tracking development, finding a job, evaluation within a course, and performance monitoring in the workplace – showed widespread activity, with at least 30% of authors implementing each use. Patterns of correlation between measures of success for each use showed that educational planning played a central role. While surely not a surprise to the personal development planning community, this was a striking result given the lack within the software of any explicit prompts or categories that encourage planning.

For each of the six uses, portfolio authors identified the primary role they assumed for that use: student, educator, and worker. 28% of the time, users reported assuming a role different from that which they had named as their primary role when creating their accounts. Users both switched roles over time and assumed multiple roles simultaneously. This frequent role switching is strong evidence of learning that extends beyond a single educational or workplace context.

Perhaps most surprising, however, was the lack of any correlation between the level of support for authors' portfolio composition – and use by their institutions – and any of the survey's measures of success, such as satisfaction, perceived effectiveness, and level of impact on learning and institutional relationships. The age of the user, which ranged from 16 to 66, also showed no effect on either the success or difficulty users had with the software. By focusing on the factors that led to success, the interviews shed some light on these unexpected results.

While most users reported that using 'e-Folio Minnesota' had a moderate level of impact on their learning and relationships, 18% reported either a substantial or a great improvement. Interviews with a sample of these high impact users revealed that two primary factors predict significant impact: audience and ownership.

Users with a high level of impact felt strongly connected to their audiences. They had a clear sense that their portfolio was being read, they knew who had read it, and they had received responses. They also had a clear sense of their intended audiences and what they wanted to communicate to each, and could articulate how their portfolio was designed to reach the audiences. In addition, because most chose to make their portfolios fully public, they had contemplated the implications of 'being out there,' considering the reception of their self-representation by both unanticipated and intended audiences.

High impact was also much more likely when users felt a strong sense of ownership of their portfolios. These portfolios often demonstrated a high degree of integrity: they integrated academic, personal, and professional activity and identity to represent the whole person, helping the author to figure out how to manage and make sense of the competing demands of these different spheres of life. Topicality was also important in establishing ownership. Successful portfolio authors felt that their portfolios were accurate representations of how they wished to be seen 'as now', finding an appropriate rhythm for revisions over time.

These factors, audience and impact, point to ways that institutional support does, in the end, matter. Interviews revealed that software design influences access to audiences through making the portfolio findable and through offering ways to connect with readers. Institutions can provide contexts for collaborative authorship, giving portfolio authors access to each other during the process of experimenting with writing. The way

portfolio composition and use is introduced to new users also matters. Those encouraged to think about a wide range of uses, not just the immediate institutionally-supported purpose, were more likely to create integral portfolios with a strong sense of ownership. The degree to which the software supports revision and adaptation over time is also key to sustaining ownership.

MnSCU is currently implementing further improvements to the software and program based on these research findings. UK institutions committed to lifelong and life-wide learning may also wish to consider the implications for their work. The full report of the research results has been published by MnSCU and can be obtained via my blog at:

http://ncepr.org/ncepr/drupal/node/17 (accessed 5 December 2005). You can learn more about 'e-Folio Minnesota' at its website: http://www.efoliomn.com/ (accessed 5 December 2005).

News & Events

The National Coalition for Electronic Portfolio Research Invites You to Apply for Its Next Cohort

It was formed in the United States in 2003 to promote research on e-portfolio practices at colleges and universities. Around the world, e-portfolio practitioners are developing multiple uses of electronic portfolios – for personal planning, learning communities, advising, graduation requirements, and other purposes related to academic progress and lifelong learning. Practice, however, has outpaced research into the effectiveness of e-portfolio use. The National Coalition was begun to engage campuses in collaborative efforts to investigate the impact of e-portfolio use.

Applications will soon be issued for the 2006-2009 cohort with two significant changes. With co-sponsorship by the National Association of Student Personnel Administrators, this cohort features teams that include both academic affairs and student affairs educators at campuses that are encouraging, documenting, and assessing both in-class and out-of-class learning. The second change is that campuses from the UK are invited to apply for the cohort so that experience from a wider spectrum of practice can enrich the knowledge base.

The Coalition offers to its participants:

1. International exposure for significant research.

2. Opportunity to work with other institutions committed to electronic portfolio programs as they learn with and from each other.

3. Ability to connect practice with theory and research.

4. Opportunity to document findings in a systematic way.

5. Access to experienced consultants.

Participant responsibilities include:

1. Commitment to an ongoing electronic portfolio program that teams student affairs and academic affairs.

2. Commitment to documenting and interpreting evidence of the impact of electronic portfolios on learning.

3. Commitment to a three-year project, including financial support by the institution for team participation in two face-to-face meetings per year in the US; participation in on-line communication; and completion of the research project with dissemination of findings through the Coalition.

The main goals of the Coalition are to provide leadership in assessment of the impact of electronic portfolios and to convene researcher/practitioners who do work in their own context for mutual support and critique and for disseminating their findings nationally and internationally. This Coalition advances the body of knowledge about impacts of electronic portfolio use on student learning and educational outcomes.

If you are interested in receiving an application form to join the 2006-2009 cohort, please email to Barbara Cambridge, Coalition Co-Director, at bcambridge@ncte.org. She will be glad to answer questions and to send you materials needed for applying. Applications should be received by late January 2006.

Developing a CPD Culture in Your Organisation

24 February 2006, University of Huddersfield

A half-day seminar to learn about and exchange good practice in higher education, professional bodies and employer organisations.

A key aim of the event will be to explore the differences and similarities in practice between the range of organisations involved, and to begin to exchange views and experiences for the benefit of individual learners as they move and progress between those organisations throughout their lives.
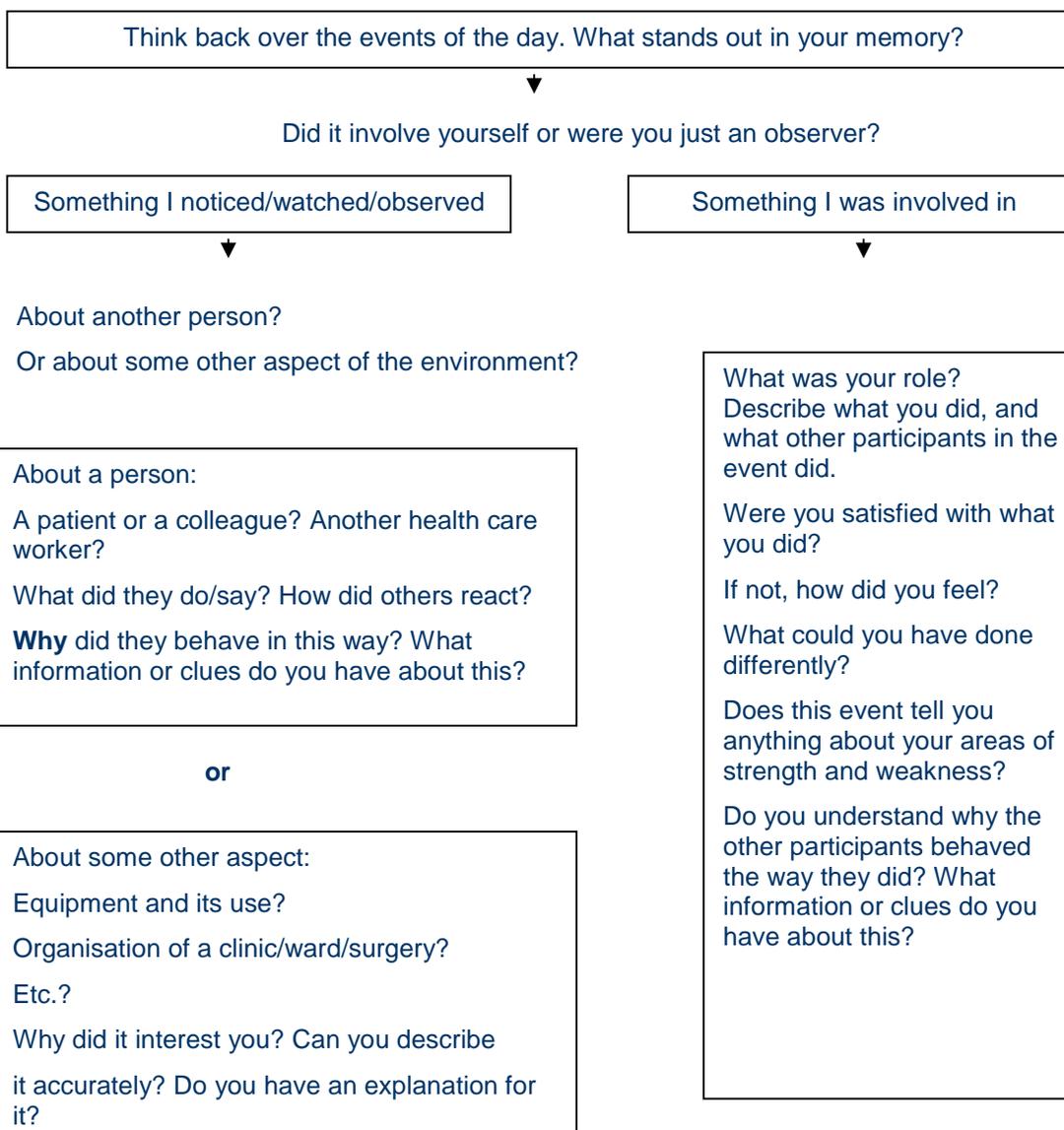
For more information and to register, please contact Hayley Sambrook at hayley.sambrook@recordingachievement.org

Guidance on making notes from clinical placements

The notes you take while on clinical placement, together with your reviews of them constitute a reflective log of your development as a clinical practitioner. Reflection on practice plays a major role in expanding our knowledge base and bringing together theory & practice. It is a tool for learning that needs to be practised: not everybody is naturally good at reflection. But it relies heavily on self-awareness, honesty and openness. The following guidelines have been written to support medical students in developing a reflective log.

Getting started

Are you having difficulty getting started with a reflective log? Are you not sure what's worth recording, and to what level of detail? Here is a flowchart to help you, showing you might go about it. You could follow this until the process itself seems more natural.

Think back over the events of the day. What stands out in your memory?

Did it involve yourself or were you just an observer?

Something I noticed/watched/observed

Something I was involved in

About another person?

Or about some other aspect of the environment?

About a person:

A patient or a colleague? Another health care worker?

What did they do/say? How did others react?

Why did they behave in this way? What information or clues do you have about this?

or

About some other aspect:

Equipment and its use?

Organisation of a clinic/ward/surgery?

Etc.?

Why did it interest you? Can you describe

it accurately? Do you have an explanation for it?

What was your role? Describe what you did, and what other participants in the event did.

Were you satisfied with what you did?

If not, how did you feel?

What could you have done differently?

Does this event tell you anything about your areas of strength and weakness?

Do you understand why the other participants behaved the way they did? What information or clues do you have about this?

Keeping a regular record

You may not have something to make a note of every day of your placements, but you should have at least four or five notes for each week. Carry a notebook with you at all times on placements. If something worth remembering happens, note it down at the time, with enough detail so that you can remember it later for analysis.

In each case, your notes should allow you to **describe** the incident or event, then to think about why it was significant to you. This is the first step towards **analysis:** asking yourself what the incident revealed or implied, what you learned, what questions it raised in your mind.

The weekly review: the next step in analysis

When you come to write your weekly reviews, play the events back in your mind. This might mean putting yourself in the shoes of your colleagues or the patients. Determine any other contributing factors that led to the event you noted. It may well be useful to relate things back to what you have learned on the course, in PBL sessions and in clinical and communications skills sessions.

This process of reflection may also be focussing on **you**, what you were thinking / feeling at the time of the event. You may feel particularly 'good' or 'bad' about a particular event. By putting your thoughts and feelings down on paper, you may be able to become more objective regarding the sequence of events, beginning to recognise why you responded the way you did and what influenced you at the time.

Your weekly review (and of course, by implication, the daily notes you make) should cover **all** of the occasions for reflection in the flow chart above: reflections on yourself and your own behaviour, on the behaviour of others around you, on technical aspects of the environment. In any one week you may find you have nothing to record about one of these areas, but be aware – if you are recording nothing in one area, should you make a special effort to focus on it the following week?

Confidentiality

If you are worried about recording an event which shows someone else in a poor light, **do not** include the name of the person concerned in your entry. The individual may well still be identifiable, but your personal development tutor will respect the confidentiality of your portfolio.

Don't be afraid to record whatever happens that you think is significant – even when you're not entirely happy about what you did or said! Recognising where we need to change or improve our behaviour is a vital professional attribute, and if you can't recognise your areas of weakness it's very difficult to get better. But equally, you should recognise your strengths and your developing skills, and writing this down may help to foster your self-confidence.

Some examples of reflective notes:

- I felt nervous, like everyone was watching me, even though I've practised doing this. I hate feeling incompetent even though I know I'm just starting – does this stop me asking questions?
- I felt confident in talking to a new patient today and taking a history. I've done this several times now, so I was happy that I got the chance today and it seemed to go well. The patient must have been impressed as she then asked a lot of searching questions! I will need to read more around conditions I'm learning about 'on the job'.

Cont …

- I've been watching nurses and doctors talking to each other, and I'm beginning to get a sense of the different roles and expertise. I still don't know what a nurse can and can't do though. I can see that different health professionals adopt different styles to put their patients at ease – I must try and find a suitable style?
- I watched a nurse take blood today. She seemed very brisk and didn't say much to the patient, but perhaps this is a regular routine and the patient trusts her? She was certainly very quick and efficient.
- My GP had to examine a child today – I noticed she asked some questions first about irrelevant things like going on holiday – to get the child to relax? Does she have a standard approach? How does she know if it's working?
- The patient was asking questions but I didn't think the doctor was answering them. Was she trying not to or didn't she understand what the patient wanted to know?
- The patient was very angry, that made me felt uneasy. I felt upset that the patient was rude to me. But I know she was in a lot of pain. Maybe I was just an easy target. I didn't know what to say, or whether I should have said anything – I might have made things worse?
- I felt faint when I watched the doctor doing a lumbar puncture, nearly fell over. It's happened before but I'm getting to know the signs so I can take myself out of the room
- The staff I'm attached to are very supportive, even though they're working under a lot of pressure, they still gave me the opportunity to take a history, this makes me feel nervous sometimes, but it's good to get a chance to practise.

The periodic review and self-assessment

The periodic review and self-assessment document plays a key role in your development as a reflective practitioner, because it is designed to provide the basis for your review meetings with your personal development tutor. Unlike the weekly review, it has a pre-defined structure, asking you to consider in turn four different areas: your strengths, your weaknesses, opportunities for and barriers to your learning. Following these, it asks you to review the targets you set at the previous review meeting, and to set yourself new ones (to discuss with your personal development tutor and finalise after that meeting.

Remember that targets should be SMART – i.e. Specific, Measurable, Attainable, Relevant, and Time-limited – if they are to be really useful to you. "Must try harder" probably never helped anyone very much!

It is very important that you complete the periodic review and e-mail (or otherwise send) it to your personal development tutor in advance of your review meeting. Your tutor needs a chance to think about the issues you raise, whatever they are about.