



# Incommunities UKHA Award Submission

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## Summary of the project

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During 2007 Incommunities (formerly BCHT) introduced a new approach to corporate planning, project management and tracking organisational improvement and in recognition of our need to evidence continuous improvement following a very positive Audit Commission inspection. Incommunities commenced work on this with The Universal Improvement Company using the **UIMPROVE** approach in June 2007.

This approach has involved

- ❖ An uncomplicated, fun and inclusive approach to planning and project working at all levels of the business
- ❖ Developing the skills of 12 Facilitators who are the guardians of **UIMPROVE**
- ❖ Training a group of key managers to use the approach on business critical projects to 'lead the way'
- ❖ Working across the organisation with teams to identify and deliver the objectives of the Corporate Plan
- ❖ Delivery of the "golden thread"
- ❖ Further training of 4 facilitators to deliver licensed training modules from **UIMPROVE** throughout Incommunities
- ❖ Developing a structured method to track and measure outcomes of some 1500 business improvements

Since the introduction of **UIMPROVE** in August 2007, the 12 facilitators have enabled the delivery of 51 events and over 880 staff, external partners, board members and tenants have taken part in these events.

The formal roll out of in-house training has now commenced and by the end of 2008/09 a further 100 staff will have been trained in the approach, with a further 200 scheduled for 2009/10.

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## What we wanted to achieve at the start of the project

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Incommunities is an organisation with over 1000 staff working in a diverse range of business activities with a significant number of complex interdependent improvement projects happening at any one time. A key business risk centred upon the potential for projects to fail, duplicated effort and cost more if not managed effectively.

As part of Incommunities approach to achieving service excellence it was recognised there was a need to develop and implement a simplified performance management framework and to ensure that through the approach everyone within the company, irrespective of their understanding of traditional project management could become involved.

It was decided the best way to achieve this was to train people throughout the organisation who would lead and take part in projects and bring in-house the skills required to facilitate projects, events and meetings for all tiers of staff, boards and customers. It was also important to establish an approach which would suit Incommunities cultural style without being too mechanistic, bureaucratic or rigid.

Introducing such a far reaching change also needed to be affordable - presenting good value for money and be sustainable in the long term.

The **UIMPROVE** approach was chosen and adapted to suit Incommunities on the basis that we could train our own people and to then achieve a true skills transfer we licensed four of our facilitators to roll out structured training. The modules trained are called *Universal Improvement Skills and Improve Your Projects* and as a result our facilitators have become our local experts who are on site and able to support projects and organisational change through 'real work' rather than just theory.

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## Were the aims and objectives met?

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A key element of the **UIMPROVE** is a structured approach to Annual Planning. This was implemented across the organisation to devise the Corporate Plan and ensure delivery of the “golden thread”.

The first Annual Planning event was held with the Executive Management Team. This resulted in a “Project Steering Grid” identifying the key top level projects to fulfil the strategic objectives that needed to be delivered across the organisation in the coming year and beyond.

Subsequent Annual Planning events took place for each Assistant Chief Executive with their Directors, then with Directors and their teams, cascading down through the organisation. This resulted in a series of Project Steering Grids across Incommunities, from which the formal Corporate Plan was derived. This met our objective to ensure that our plan was truly inclusive allowing staff, board and our communities to influence our direction.

Incommunities has also been using the **UIMPROVE** to ensure those projects are delivered. By training relevant staff in the methodology and through the use of trained Facilitators, the organisation has been able to operate a structured approach to projects that has substantially improved delivery.

Through this approach we are now able to track and measure the progress of complex projects, whilst minimising the bureaucratic side of project management and making this accessible across our whole organisation.

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## The key challenges and lessons we learnt

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Working within a large organisation constantly presents issues particularly effective communication and making sure that people are aware of work which is happening throughout the company is extremely difficult. **UIMPROVE** was adopted specifically to help bridge many of the communication gaps.

One of the key challenges was to achieve 'buy in' across a wide group of people, especially where they had their own preferred methods of doing things. A good example of this would be that our IT team had effectively used Prince II to manage their complex projects and had trained their staff in its application; however this was not necessarily suited to others who had not undergone such formal training. In order to ensure fit across teams we had to ensure that both approaches could work side by side to protect existing training investment and engage with staff that were less comfortable with the rigour of Prince II. We did this by training IT staff in **UIMPROVE** and using key elements of the approach at certain stages of projects whilst continuing to apply the Prince II model within IT.

The other key challenge was finding a suitable group of people interested in being trained as facilitators without being able to offer additional payments as we saw this as an opportunity for personal development. These people were key to the success of the project and needed to see and understand the benefit of structure in the workplace. They also needed to be able to fit in the demands of facilitation in addition to their day jobs.

We learnt that communicating with their line managers about what we wanted to achieve was vital. We had to build in structured reviews to ensure that there was no conflict with facilitators work priorities to allow everyone the opportunity to say no to events at busy times and to acknowledge time and effort with thanks and appreciation.

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## How we have measured and evaluated our success

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Investing time, resources and effort in such a project has required a stringent evaluation process. There are a number of factors which have been used to assess the impact of the approach, including

- ❖ Formal reviews and feedback with facilitators and project leads following events
- ❖ Comparison of the number of potentially duplicated projects
- ❖ The number of events held
- ❖ The number of people from within and without the organisation who have participated in events
- ❖ The number of training days achieved
- ❖ The value for money of delivering this approach in-house using less external support

A prime measure of success is the change in the individuals who trained as Facilitators and those who now deliver the training. When asked how the training had developed their skills, they replied with the following:

"We have gained a much broader view of the organisation and increased knowledge about the different specialist teams. We now have the ability to scope projects and use the correct methodologies to guide Project Leaders to produce clear remits and plans for projects".

"We have obtained a sound structured approach and tools and techniques to ensure there is a wide range of involvement and participation from the correct people".

"We have also developed skills for dealing with real life day to day situations such as effective meetings to ensure objectives are covered and reviewed".

"Overall we have an increase in confidence when dealing with all levels within the organisation and the ability to facilitate events with external stakeholders".

"It has provided such a clear structure when planning and carrying out projects with unfamiliar subject matters".

"It has increased the awareness of how important operational planning is to the organisation and how it all fits with the corporate plan and that communication and review are fundamental".

"The whole training package has provided 12 people in the organisation with the fantastic opportunity to support projects to ultimately provide improvements and changes to services".

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## The key positive outcomes

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The key positive outcomes are still emerging. We are in the middle of our first full cycle of projects which have come out of our 2007 Annual Planning events. Through discussions with each division it is clear that the framework has been adopted to monitor and track progress for projects through steering grids, which is a significant change in behaviour. Prior to this, projects happened and were successful, but were more ad hoc in terms of process - meaning that the outcome was less certain.

Projects have a much more structured life with the right people being involved at the right time, with much less duplication.

Our Annual Planning events have identity and meaning and even though they previously happened they did not necessarily link together in such a strong manner. As a result teams are more aware of projects across the business and are able to become involved more easily and able to influence outcomes.

Facilitators are a significant resource within Incommunities and are highly skilled in providing structure and ongoing support to large and small projects. Their skills have broadened considerably to the point of now becoming trainers.

We have seen an increase in the quality of outcomes from complex projects and people leading these projects have said that they have progressed at a much quicker rate than previously with less stress.

The tools and techniques have been embraced by people throughout the organisation to the point where we are able to involve staff who normally work remotely on projects and thereby make them feel more valued and included.

We have broadened the range of people who influence projects and the process for that engagement has become more relaxed and fun, whilst still maintaining structure and purpose.

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## How we demonstrate positive practice in equality and diversity

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One of the key strengths of the approach is that it is inclusive and entirely structured to encourage participation. It is straightforward, does not rely on complex traditional project management methodology and is easy to understand and apply. Our approach has allowed Incommunities to demonstrate positive practice in equality and diversity in its widest sense as the tools adopted work right from the boardroom to the frontline. In most large organisations involvement in projects is confined to specialists and managers with little meaningful involvement from the rest of the organisation, especially the people who deliver frontline services and the customers who receive them. Incommunities consciously chose the **UIMPROVE** approach because people are involved in a structured way, it is not pretend participation. Those who do the job are involved and make a difference in a more meaningful way, both for the participants themselves and in terms of the feedback the organisation gains from their participation.

Because the approach is flexible Incommunities has been able to involve the right people at the right time from all levels of the organisation ensuring that participation is relevant to the subject matter and not a 'one size fits all approach'. This has allowed us to live our equality and diversity values through all project management activity.

Key features compared to other project management methodologies include building in participation both in terms of structuring it into the project right down to how to get people to participate at every stage through the use of appropriate group working tools and techniques. The approach's flexibility ensures that the tools and techniques can be adapted to suit the needs of the participants. This has been extremely successful in practice in consulting with disabled customers on Incommunities' Disability Equality Action Plan.

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## Elements of this that can be replicated by others

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What we have done at Incommunities is designed not to be overly complex. We have taken a very simple approach - **UIMPROVE** - and applied this throughout the organisation and it is this simplicity which has captured people's imagination.

The simplicity even in a large organisation is what gives the approach its strength.

In total we have initially trained 48 people in the organisation in **UIMPROVE** which achieved a critical mass in the first instance of people doing real work. Alongside this training we created a pool of 12 skilled Facilitators who support projects and help with real work. We now have four fully licensed trainers who will role out the two modules to another 300 staff.

We have worked with management teams throughout the organisation, helped with major projects, departmental restructures, tenders for contracts and Corporate Planning. Each of these events has been facilitated internally using a consistent approach. This has meant that **UIMPROVE** has now touched almost all parts of our company and people are talking about it and recognise its value.

On reflection the approach is very portable, all that needs to be considered is the complexity and the scale of the organisation to determine the required numbers of facilitators and the initial set up costs in relation to the cost of failed projects and duplicated effort.

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## How we have contributed to meeting wider organisational objectives

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Adopting **UIMPROVE** is a major part of Incommunities wider approach to improving how we deliver services to customers and will support our ongoing work to evidence improvement. We recognise that improvement only takes place project by project and introducing rigour and structure has strengthened our capacity to deliver such change in fast moving and complex business.

**UIMPROVE** is simple in concept, but it is this simplicity which is so appealing to people throughout the company, requiring common sense and commitment but at the same time being fun.

We have improved our overall approach to Corporate planning by involving a wider range of people than ever before, in a structured manner. Our projects are now captured and tracked more easily without the need for complicated IT applications and people understand how to get their projects done without lots of form filling.

We have designed our approach to fit well with our culture and it is this fit that helps maintain the integrity of the approach.

The approach is truly inclusive and helps us achieve our wider aims of engaging with people from diverse backgrounds and has proven popular amongst customers, boards and partners alike.

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## How we will sustain this change

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We have gone through a review of the approach, to determine how we are able to meet demand for facilitators going forward, as we have seen a steady increase in requests for support as we roll out further training. From this review we have identified the need to increase our pool from 12 to 15 especially as four of the original team are now involved in training staff.

Our Chief Executive and Management Team are fully committed in supporting **UIMPROVE** in the long term and have championed the benefits of such structure throughout the organisation.

Our investment in licensing internal trainers naturally commits us to ensuring that we get value for money from our strategy and once we have completed roll out to the other 300 staff we will see benefits in relation to the volume and breadth of project work within Incommunities. Evidencing change in the face of short notice inspections will be even more important in the future and through this work we have readily available evidence which we can show with pride to inspectors.

We will ensure that people who join the organisation are inducted into our approach early on to help them fit into our culture and gain an understanding of our work.

The key feature to sustaining the approach is in the way that our Annual Planning relies on the tools and techniques to get the job done. Without the support of facilitators people would revert to old habits and it is the consistency of application of the approach which the facilitators guard meticulously.