
Yearbook

Looking back
and looking forward

2012



- We ♥ Annual Planning
- Fantastic, Brilliant, Achieved a Lot
- Kestrel in Queensland
- 20 Years of the UIC



The Universal
Improvement
Company

Introduction



So, looking forward into 2012, what can you expect to see? Well primarily more of the same. We like to say everything we do is tried-and-tested so that's what you'd expect. On the other hand we do continuously improve everything we do so, if it's a while since you had any training, think about a refresher. Our public courses are ideal for this.

In Australia, we'll be running our 1st Annual Performance Conference for our public transport clients. In order to open this up to a wider audience, we are working in association with the UITP (International Association of Public Transport) Australia New Zealand. And in the UK, this year will see the 6th Annual UIMPROVE Facilitators Conference.

A new version of The Complete Guide to Improvement is also in progress. In particular this will have new and expanded sections on data and managing routine operation.

You'll be able to find out about all these and everything else we do this year in our next Yearbook. Until then, we hope you enjoy this one.

Richard Capper

Welcome to our second Yearbook, taking a look back over 2011 and looking forward into 2012. We've been listening to what people found interesting, useful and enjoyable about our first Yearbook and have made some changes as a result. As well as a complete record of all our photos from 2011 and the usual array of articles submitted by a wide variety of people, this year we have a couple of sections with the specific objective of helping our clients learn from each other.

Section 01 - The Big Picture features a selection of articles about improvement at an organisational level. Section 03 is a special feature on Annual Planning and Project Steering Grids. These sit alongside a real mix of content in section 02 - Variety is the Spice of Life, 04 - Public Courses including our dates for 2012 in Australia, Holland and the UK, 05 - Facilitator Pages and 06 - Systems Update.

95% of the content of the Yearbook has been written by you, our clients and to everyone who has contributed we say a big thank you.

2012 is a very special year as, on 30 April, it's the 20th anniversary of the UIC. It's amazing to look back and see what's the same and what's different. There's lots of both.



The Universal Improvement Company



01 The Big Picture

- The TransLink Years
- My Secret Life
- The Regenda Way
- The Journey Continues
- British Red Cross
- Fantastic, Brilliant, Achieved a Lot
- Changing Lives for Good

The TransLink Years

Peter Strachan is one of the UIC's longest standing clients. In late 2011, he packed his bags in Brisbane and headed for the UK to take up the post of Director General at the Department for Transport. We asked Peter to reflect on his TransLink years.

Wind back to March 2009. I arrived in TransLink as the new CEO and found a newly created transport authority which was trying to do hundreds of things but with an absence of structure and clarity of strategic direction. It's supposed to take you the famous first 100 days to work out what needs to be done - but I considered that we needed to move more quickly than that. So I created the "TransLink 12" - a set of 12 strategies which covered all the key areas of the business we needed to focus on, from customer service to improving the relationships with our delivery partners through to capital investment and developing a people strategy for the business. The intention was to give the organisation a clear focus and concentrate on the most important deliverables.

But how to do it? In previous jobs I'd always harboured the dream of having enough in-house Facilitators to take on a large enterprise-wide improvement program like the TransLink 12. What better time than now to realise that dream? So we set about training the first tranche of Facilitators, knowing that they would be immediately deployed across the T12. And to make sure that the managers who would be the Champions and Project Leaders had some appreciation of the methodology we ran a masterclass to fast track their UIMPROVE learning.

Numerous Kick-Starts and Steering Groups later and the TransLink 12 was in full swing. TransLink 12 strategy 1 was to restructure the business and create a fit for purpose organisation. I'd inherited a bit of a mixed-up structure which, for example, had customer service as part of finance so there was some urgency to fix it. I also knew that unless we got the structure sorted out, the delivery of the TransLink 12 overall would be much harder as people grappled with the confusion of who was responsible for what. By the end of June - just 7 weeks after I launched the TransLink 12 - we went live with the new structure.

With the new structure came a new Leadership Team and I'd deliberately appointed a balance of existing senior players, rising stars and new blood from outside TransLink. But new teams don't form (or storm, norm or perform) by themselves or by accident and so we embarked on a series of Team Events known as "Bribie", named after the location north of Brisbane where we met. Bribie now happens every 4 months or so and has been fundamental in building the team and embracing change. Richard and Jenny guided us through Bribie 1 to 5, with Lisa taking the baton for 6 and 7 and having that consistency of facilitation plus a keen external observation of the team's evolution has been invaluable. Bribie 6 was a landmark - for the first time ever in my 30 years I had a team which was exactly 50-50 in gender split. This may be a bit old hat for the UIC but not in public transport!

With the first tranche of Facilitators being increasingly called upon, we stepped up the capability and trained a second group, then a third and early in 2011 a fourth. We now have over 40 trained Facilitators - so my dream over the years of having strong in-house capability has certainly been delivered. And to make sure that our key managers weren't left behind we ran

a Strategic Improvement Programme which embedded the methodology in the wider leadership group. Cue lots of Project Steering Grids and walls covered in flipcharts and post-its on every floor.

Looking back, there are always some personal highlights of seeing project-by-project in action. The improvements made through the TransLink 12 strategy on investment led to us being awarded the Australian Institute of Project Management "project managed organisation" status, the first Queensland Government entity and one of only a handful in Australia to receive the recognition. The crisis management review of the devastating floods in January 2011, involving internal and external sessions facilitated in-house proved that we had the capability to do the very serious stuff too. And the regular Interface Events with our biggest delivery partners in rail and bus have been the



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building blocks for a much better working relationship. But seeing the Leadership Team develop into one of the strongest teams I have been privileged to lead will be my standout memory.

It's now a much more mature TransLink than the fledgling transport authority of two and a bit years back. Results have been strong in customer delivery and performance across the business. Our partnerships have strengthened and our staff satisfaction is significantly up.

Thanks to Richard, Jenny, Lisa and the rest of the UIC team for coming on the journey with us. And long may notebooks and post-its be part of the TransLink tool kit.

*Peter Strachan
(former) Chief Executive Officer
TransLink Transit Authority*

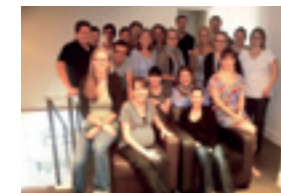
- 01 BRIBIE 7, AUGUST 2011
- 02 PETER (RIGHT) WITH MATT LONGLAND TRANSLINK'S INTERIM CEO, PAUL SCURRAH CEO QUEENSLAND RAIL AND JENNY MARKETING, PRODUCT DEVELOPMENT AND WEB SERVICES TEAM CONFERENCE, APRIL 2011
- 04 FACILITATOR DEVELOPMENT PROGRAMME, JUNE 2011
- 05 AUSTRALIA TRADE COAST AND TRANSLINK INTERFACE EVENT, SEPTEMBER 2011
- 06 QUEENSLAND RAIL AND TRANSLINK INTERFACE EVENT, SEPTEMBER 2011
- 07 CUBIC TRANSPORTATION SYSTEMS AND TRANSLINK INTERFACE EVENT, OCTOBER 2011
- 08 BOARD AND LEADERSHIP TEAM STRATEGY EVENT, OCTOBER 2011



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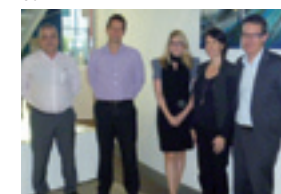
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My Secret Life



Dallas Follett

I started living the UIMPROVE way of life in late 2009. Since the first module of the Facilitator Development Programme, I have found the tools to be so valuable helping me both in and out of facilitated sessions.

With a pad of post-it notes you can just about accomplish anything. I use them everyday and have even been sad enough to use the Tools for Decision Making at home for some of the less critical but still important decisions like which picture to hang on the wall!

I have found the tools a great way to get organised and to stay organised especially during busy times. All you need is a bit of UIC thinking!

How I use the tools to get (and stay) organised:
I do my to-do list with post-it notes on the wall. You can move them around, rearrange your priorities when something new pops up and you get a terrific sense of accomplishment when you rip the post-it off when completed.

I regularly use Flowcharting in my job and love the ability to map a process in such a way that allows you to adapt and change as the organisation changes.

I have adapted Gantt Charts to use post-it notes so that, when timeframes or deliverables, change all it requires is a peel off of the post-it note and simply shift it to the new deadline.

As a Team Leader I have introduced the effective meetings tools to my team and, while some days it is hard to get the rowdy bunch to stick to the Round Robin, it is well worth the change. Using some of the other tools with the team at meetings (like Cocktail Party and Brainstorming) helps me get the most out of my team and ensures that they all get to contribute.

The tools are there to be used. Why not use them to your advantage in the office (or in the words of UIC and Dr Deming your 'routine operations')? Don't wait for a formal session - you may find yourself rusty!

*Dallas Follett
Team Leader
TransLink Transit Authority*

The Regenda Way

We are a 'people industry'. That's an over-used term I have heard so many times in my housing career that it now carries very little impact.

This has become the default position across Social Housing when addressing problems or trying to drive improvements. Rather than looking at systems and processes, often efforts are channelled solely into finding 'people' solutions. Arguably, this has led to a great deal of wasted effort and, worse still, missed opportunities.

We at Regenda came to consider the UIC approach for a number of reasons. We believed, rightly or wrongly, that we were better than many of our peers but not getting the recognition our efforts deserved; our performance was good but we were working too hard and not smart enough and we were not realising the full potential of the great pool of talent in our workforce.

With some healthy cynicism, we came to our first session with Richard and Denise to be told of the virtues of the Notebook which was not the illuminating or strategic start I or my Executive Team colleagues had imagined. However, their tried and tested approaches and the methodologies they skilfully described made sense. Using the adage of '85% of problems is down to process not individuals', the approach became crystal clear and is now the mantra within Regenda.

Over the past year, the power and impact of what we have learned and put into practice, through adopting the techniques shared with us, has transformed the way we do business at Regenda for the better.

What it has taught me personally is that the way to build a healthy, dynamic organisation and get real buy-in from your workforce is to have the techniques to meaningfully engage so that you get the benefit of everyone's expertise in an inclusive and non-confrontational way. The approach needs to reinforce and contribute to the leader's role in making the right decisions for the Group. Consultation is just that; it does not allow the leader to abdicate responsibility but it does open them up to having to confront opinions and perspectives that may not be heard or seen through more conventional methods. Our experience in embracing and re-branding the UIC approach to the Regenda Way has been very stimulating and highly productive. It's seen a major cultural shift across the organisation and we are now working in a much more purposeful way.

More importantly, it is driving through improvements in performance and that can only be good news for our customers and staff alike.

*Bernard Gallagher
Group Chief Executive
The Regenda Group*



Bernard Gallagher

If you'd like to hear more from Bernard, he's the Keynote Speaker on day 1 of the 6th Annual UIMPROVE Facilitators Conference, 14-15 May 2012



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- 01 STRATEGIC IMPROVEMENT PROGRAMME, JANUARY 2011
- 02 STRATEGY DEVELOPMENT EVENT, MARCH 2011
- 03 FACILITATOR DEVELOPMENT PROGRAMME, APRIL 2011
- 04 DEPARTMENTAL EVENT, MAY 2011
- 05 UNIVERSAL IMPROVEMENT SKILLS, SEPTEMBER 2011
- 06 UNIVERSAL IMPROVEMENT SKILLS, OCTOBER 2011
- 07 STRATEGIC IMPROVEMENT PROGRAMME, OCTOBER 2011
- 08 UNIVERSAL IMPROVEMENT SKILLS, OCTOBER 2011
- 09 UNIVERSAL IMPROVEMENT SKILLS, NOVEMBER 2011



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The Journey Continues



The Regenda Facilitators

A year ago The Regenda Group had:

- Two freshly trained Facilitators
- A 'fresh-faced' Executive Team recently introduced to the Strategic Improvement Programme
- A cottage industry approach to improvement with projects plucked from anywhere and everywhere with no clear direction, no real start and end dates which meant they were often being revisited after a couple of years
- Meetings that went round in circles and usually lasted all day with no decisions. The same discussions were had at the next meeting, rafts of minutes were produced at the last minute and no tasks were completed

This year we have a whole new way of working, the Regenda Way embracing the UIMPROVE approach, tools and techniques. We now have:

- 14 Facilitators, coordinated centrally from within the Business Planning Team who between them have facilitated 48 events, including Annual Planning, Project Events that include Kick-Starts, Project Reviews, Project Refocus, Customer Events, Process Analysis Events and many meetings. The Facilitators have regular Network Meetings to share experiences and refresh their skills.

- 64 UIMPROVE-trained managers, from the senior to middle level who are now fully equipped and understand the new way of working which has helped alleviate the initial frustrations and challenges experienced by only a few being trained
- The growth of a Regenda 'improvement factory' through the Annual Planning cycle. Corporate, departmental and team projects have been developed using a structured approach.
- The use of Project Methodologies, steering, and involvement at all levels, the use of improvement tools alongside data methodology has identified areas of improvement in a non-threatening and practical way
- Piloting that allows us to measure effectiveness, ensuring the way forward is fit for purpose, for the organisation and the customer
- Meetings at every level of the Group that now have structure and, by using a range of tools and techniques such as Briefings and Preambles, these meetings are more effective and get the outcomes required in minutes rather than hours!
- Increased ownership as we see all levels of staff walking around with their notebooks. Gone are non-essential minutes. Actions are being taken away in notebooks and completed in good time.
- Improved our approach, our philosophy and ultimately we believe our business

Next year the journey continues...

We will be publishing and working with our new Annual Planning Calendar which provides structure around the strategic development of the Group. Building upon the implementation started this year, the publication of the calendar will give a shared understanding for all staff of the key dates and activities within the Group which together will help us to continually improve and grow.

The Group will continue to learn and develop with the Executive Team attending the Universal Data Skills course, followed by the senior managers and the whole Group reviewing all we do.

Jane Newsham, Tracey Wilson, Julie Vincent and the other Facilitators The Regenda Group

British Red Cross

Hi - my name is Sarah Gibson and I am the Area Operations Director for the British Red Cross in Cornwall, Devon, Dorset, Somerset and the Channel Islands. I joined the Red Cross in 2009 and am responsible for a mixed portfolio of services operating across this large geographical area. Our services range from health and social care, support to the emergency services, work with vulnerable refugees, unaccompanied minors and asylum seekers and, of course, teaching first aid.

The services we offer are co-ordinated and managed by paid staff but delivered in the main by volunteers. There are 106 staff and 2700 volunteers working across my patch and I have direct line management responsibility for eight senior managers and a 'dotted line' responsibility for a finance manager.

Prior to my appointment the service teams had worked very independently, services being delivered in isolation and without any real sense of a 'senior management team'. That didn't really suit my management style and I felt we could be far stronger and far more effective if we worked together to manage and deliver services and as importantly raise the profile of our work in the UK.

So I began searching the web, looking for an organisation that could offer a training programme that was very practically based, as I knew that would suit and engage my team but would also develop their management skills, teach them core project management tools and give us the opportunity to grow into a more cohesive and effective management team.



Sarah Gibson

Enter The Universal Improvement Company and the Strategic Improvement Programme, 7 days of intense learning over a period of a few months, learning that was delivered by Andrea and Alison and which combined practical skills with management theory, and above all, real opportunity to deal with the issues we face and find solutions and tools that suited us and had very practical application.

My team, which is quite a mixed bunch, all benefited and were unanimous in their appreciation of the course content and delivery. It has changed the way we work and the way we think. It has enabled us to deal with some major work projects in a structured and cohesive way. Above all it has helped us to become a team, working together to manage and grow the important work we do.



*Sarah Gibson
Area Operations Director
British Red Cross*



Strategic Improvement Programme, May 2011

Fantastic, Brilliant, Achieved a Lot

Here is an e-mail we received from Graham Kerridge at the British Red Cross

Dear Alison and Andrea

I have just come out from my planned CQC meeting which we discussed in detail at Tiverton last Friday. I thought you might be interested in some of the feedback that came out from the meeting...

"Fantastic", "Brilliant", "Long overdue", "Achieved a lot".

From my own perspective, I have given the team a list of action points and priorities that they can take forward, and a number of items that I need to address elsewhere. I will bring the flipcharts with me to our next session for review. The lesson to come out of it for me is to ensure that everyone writes their post-its in landscape rather than portrait format, preferably with the adhesive at the top! But, other than that, it went really well.

On a slightly separate point, I was talking with Mike Brooks yesterday about ordering some of the flipchart carry cases through you. I would like to place an order for seven cases. How do we go about that?

Regards and many thanks.

*Graham Kerridge MEPS
Senior Service Manager, Emergency Response
British Red Cross*

Whatever you do, don't buy your flipchart cases retail, they are extortionate. We buy in bulk from the manufacturer and are happy to provide cases at cost.

Changing Lives for Good

Great Yarmouth Community Trust is a multi-service, neighbourhood based organisation. Our mission is to change people's lives for good in Great Yarmouth. From childcare and family support or getting people into work, to services promoting the wellbeing of older people, the Trust delivers a wide range of services to over 4500 residents of Great Yarmouth each year. Much of our funding has come from government grants, although we generate a third from social enterprise activities. In the 10 years since we were created to be the successor body for the local Sure Start programme, the Trust has grown significantly and now has an annual turnover of around £3 million, 100 employees and 150 volunteers.

In March 2011 Great Yarmouth Community Trust was awarded a grant from the Office of Civil Society's Transition Fund administered by BIG. The Trust received the grant because we are experiencing a real impact from cuts in government spending - about £1 million during the 2011-12 financial year.

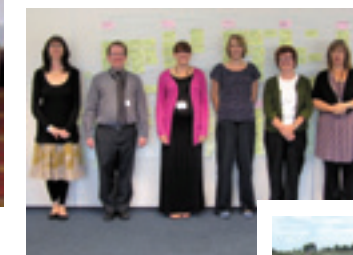
We recognised that we needed to change how we do things - be focused on improving the services we deliver to make us more competitive, and becoming more flexible so that we can create new opportunities. We knew that it would take a whole organisation approach as every part of our work was being affected.

Back in 2006, I attended a Universal Leadership Skills course with the UIC - a practice changing moment for me. With the opportunity that the Transition Fund gave, I decided that UIMPROVE was the way the Trust would go - it would become our whole organisational approach to improvement.

- 01 STRATEGIC IMPROVEMENT PROGRAMME, JULY 2011
- 02 ANNUAL PLANNING, AUGUST 2011
- 03 UNIVERSAL IMPROVEMENT SKILLS, SEPTEMBER 2011
- 04 PROJECT KICK-START, OCTOBER 2011
- 05 UNIVERSAL IMPROVEMENT SKILLS, OCTOBER 2011



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And what a journey it has been so far - and it feels like it's just the beginning:

The Senior Managers have now completed the third module of the UIC's Strategic Improvement Programme. As a result we are now working together in a more focused, collaborative and inclusive way. We have agreed the priorities for the year through Annual Planning (with some surprises about what wasn't actually important). From notebooks and meetings to projects everything feels much stronger and more effective.

24 members of staff have been through the Universal Improvement Skills course (with 12 more due to be trained in 2012). Working across teams within the organisation to develop a common and consistent approach that delegates decision making and improving effectiveness, the Trust is starting to feel the impact of the UIMPROVE way in our day-to-day work.

We are a stronger, more focused and professional organisation than before - and while we have retained all our core values and ethos - we are in

a much stronger place to continue to grow what we do over the next few years.

We looked at a range of options before starting out. We chose the UIC because UIMPROVE offers great value for money, is inclusive and empowering at all levels of the organisation and is providing us all with the right skills to help us deal proactively with the current challenges. And, although we weren't sure before we started, we have

found that UIMPROVE is the perfect fit to civil society organisations, like ours.

*Andrew Forrest
CEO, Great Yarmouth
Community Trust*



02 Variety is the Spice of Life

- Pop in for a Cuppa
- I like Preambles because
- Click here to Improve
- Good Luck to Stevenage Homes
- Deming in Schools
- 20 Years of the UIC
- Happy to Help
- PowerPoint gets Political
- Praise Indeed
- Let us know if you are on the Other Side of the World
- Pareto Principle Revisited
- How to Produce a Yearbook
- Helpers
- Alfred Health
- Pure Innovations Limited
- Broadland Housing Group
- Weaver Vale Housing Trust
- And there's More
- Out and About
- London South Bank University

Pop in for a Cuppa

Hello Sylv and Alison

I just wanted to send a personal thank you to you both for delivering an excellent course. I have really enjoyed the whole experience and I look forward to implementing this within the organisation. Never before have I taken so much from a course and believe it is possible to make such a difference.

Please pop in for a cuppa if you are ever in Plymouth.

With best wishes.

*Donna Perry
Operations Apprenticeship Scheme Co-ordinator /
Senior Team Organiser, First Great Western*

- 01 FIRST GREAT WESTERN FACILITATOR DEVELOPMENT PROGRAMME, SEPTEMBER 2011. DONNA IS IN THE FRONT ROW, THIRD FROM THE LEFT
- 02 UNIVERSAL IMPROVEMENT SKILLS, NOVEMBER 2011
- 03 UNIVERSAL IMPROVEMENT SKILLS, NOVEMBER 2011
- 04 FGW HIGH SPEED TRAIN AT EXETER ST DAVIDS



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I like Preambles because

- They set the scene
- They prevent a lot of unnecessary crap further on in the session
- They can pre-empt awkward questions
- They allow you to get everything out on the table in a clear concise way which makes more controversial topics less daunting

*Sarah Sturme
Pure Employment Manager
Pure Innovations*

I like to be kind to my audience/client/colleague and tell them in advance why and what I am going to tell. This gives them a chance to abandon ship or more hopefully tune in/prepare the ears of head and heart to hear what I would share with them. Perhaps they in turn might then do likewise... now there's a novel thought.

*Philip Crocker
Managing Director
TMM Ltd.*

Click here to improve



MAGMA GROUP PROJECT REVIEW, SEPTEMBER 2011

During 2011 Magma Group's Metro Division developed and launched a World First Internet-based car retailing concept for its client Fiat UK.

This radical new approach branded Fiat Click was delivered at breakneck speed going from project initiation to launch in just 5½ months. The project involved inventing a brand, system and company, then recruiting and training the people to operate it. There was clearly a lot to learn from the team's experiences and opportunities to improve for the next project. The UIC were engaged to facilitate those lessons via a Project Review.

Over the years I have been involved in various sessions similar to the one conducted by the UIC. Many have ended in frustration, anger or people feeling the effort was not worthwhile. The UIC Facilitators were first class, provocative enough to get the issues out but skilled in letting the people work out the corrective actions and importantly assigning responsibility. I think everybody got a lot out of the sessions and all the comments I received were positive. More importantly, future projects will benefit from the lessons learned.

www.fiatclick.uk

*Martin Leach
Chairman
Magma Group*



Good Luck to Stevenage Homes

Stevenage Homes has just celebrated five successful years and Chief Executive Lorraine O'Brien is clear that much of the success can be attributed to the way that people have embraced working 'the UIC way'. Two years after adopting UIMPROVE many complicated projects have been delivered and many staff, tenants and customers have got involved in bringing about real change.



THIS WAS THE STRATEGIC IMPROVEMENT PROGRAMME FOR STEVENAGE HOMES BACK IN SEPTEMBER 2009

"We have had fun and at the same time seen performance improve, systems become more effective and reduced wasteful practices", I have every faith that the Housing Service will continue to improve following its return to the direct management of the Council in December 2011" said Lorraine.

We at the UIC are proud to have worked with Lorraine who is an exceptional leader and we wish her all the best for the future.



Deming in Schools

Our good friend Lou Tribus has long been recommending that Quality Learning Australia (QLA) and the UIC talk. When Richard spotted that they were speaking at a Deming Conference in New York in March he decided it was an ideal time (and a great excuse) for him and Lisa to both attend the conference and meet QLA.

Whilst enjoying a cocktail overlooking Central Park, the similarities of our approaches and views on improvement in organisations became clear and in March we invited Jane and Michael on our Universal Improvement Skills public course in Melbourne. Here is a little bit about the good work they are doing.

Jane Kovacs and Michael King from Quality Learning Australia (QLA) bring the Deming approach to schools in four states and territories across Australia.

Having studied the same Masters as the UIC, Michael and Jane began the translation of the Deming philosophy from an industry context into schools and classrooms, leading a major initiative for the Australian

Quality Council in the mid-1990s. They have continued this work for nearly a decade, helping hundreds of schools to improve the quality of learning.

The philosophy and tools have direct application to classrooms of all ages. Students can, and do, take more responsibility for their learning, work with one another and their teachers to improve classroom systems and processes, and find great joy in learning and improvement.

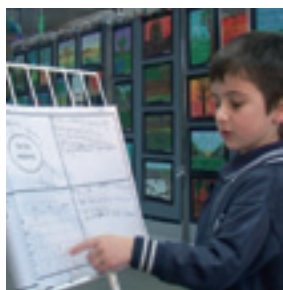
Michael King
Quality Learning Australia



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- 01 MICHELLE WORKS WITH HER YEAR 4 STUDENTS AS THEY PREPARE A DEPLOYMENT FLOWCHART OF ONE OF THE KEY CLASSROOM PROCESSES.
- 02 YEAR 12 STUDENT, CLAIRE, DESCRIBES HOW HER CLASS CONSTRUCTED A GANTT CHART TO HELP THEM PLAN AND MONITOR AN INVESTIGATIVE REPORT ASSIGNMENT.
- 03 JORDAN, A YEAR 1 STUDENT, USES THE PDSA CYCLE TO IMPROVE HIS STORY WRITING

20 Years of the UIC

How do you sum up 20 years? It was either some glowing text or dodgy photos, all from before the turn of the century. No contest.



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Each of the photos picked has someone who also features in a 2011 picture or article. Excluding UIC people, you're looking for Peter Strachan (twice), Dave Power, Leonie Saywell, Philip Crocker, Tony Barbera and Steve Banaghan.

- 01 RICHARD, DR DEMING AND TONY (EVEN MORE THAN 20 YEARS AGO!), 1989
- 02 BOOK LAUNCH, 1998
- 03 NORTH WEST EXCELLENCE AWARDS, 1998
- 04 UNIVERSAL LEADERSHIP SKILLS, 1998
- 05 FIRST UNIVERSAL IMPROVEMENT SKILLS COURSE IN AUSTRALIA, 1999
- 06 UNIVERSAL IMPROVEMENT SKILLS, 1999
- 07 EXECUTIVE EVENT, 1999

Happy to Help

We are always happy to help anybody who has attended one of our courses but some questions make us happier than others. Here's one we really liked.

Organisation: Regenda
First name: Sharon
Family name: Georghiou
Phone number:
Enquiry: I am involved in a project to review our complaints process. I am a Facilitator and I want to help the project team put together an improvement plan. I would like some advice on the best way to do this. We have had a Kick-Start and lots of suggested actions came from that. We have also had a Process Analysis Event where we did a Deployment Flowchart of the process and identified problem areas and more actions. We now need to go through all these suggestions and form an improvement plan. I would like some advice on how to do this in a structured way at our next project meeting. This is the first project that has got this far using UIMPROVE methodology and any advice would be appreciated. Thanks for your help.

If you need any help, go to www.theuic.com/help and fill in the form. This is sent automatically to everyone at the UIC so it's guaranteed to be dealt with quickly.

PowerPoint gets Political

Praise Indeed



Double-deck restaurant car in Switzerland



In February we organised and facilitated a day for the Chief Executives and 'offsiders' from four Housing Associations. Hosted by City South in Manchester, the guests were Weaver Vale, Broadland and Stevenage Homes. When Richard saw Dave Power a few weeks later, he asked how the day had gone.



I like Switzerland for many reasons, not least the fact they have nice trains with windows that line up with the seats and proper restaurant cars from which you can admire the mountains whilst quaffing wine. The Swiss are well known for their democratic ideals. Ignoring for a moment the fact that Swiss women didn't get the right to vote in federal elections until 1971, Switzerland is famous for participative democracy, in particular frequent referenda (thanks to Ivor for correcting the plural) on a wide variety of issues.

Swiss politics has recently moved to a higher level of idealism with the formation of a new political party - the Anti PowerPoint Party (APPP). Graduates of UIC courses will be familiar with our desire for people to use less PowerPoint and use the flipchart, in particular flipcharted Briefings, more frequently. The APPP has taken this one step further by politicising the issue.

Have a look at their website, www.anti-powerpoint-party.com. My favourite feature is the PowerPoint horror slide of the month. Until recently this was a competition but this had to be stopped after the APPP was overwhelmed with entries. Also check your copy of The Complete Guide to Improvement to remind yourself when you should and shouldn't be using PowerPoint for a Presentation and when to consider a flipcharted Briefing instead.

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Let us know if you are on the Other Side of the World

Pareto Principle Revisited



"10% of the flock causes you 90% of the hassle" - Countryfile, BBC1



Marianne Richards and Ken Wheatley at Oxford Street

Despite the ever less favourable exchange rate, Australia welcomed some visitors from the UK in 2011. Marianne Richards of Weaver Vale Housing Trust was on holiday Down Under in April and visited the hub of UIC Australia activity - Oxford Street, Collingwood. We also welcomed Kerrie Gallagher from Broadland Housing Group in September. We arranged visits for Marianne and Kerrie to our housing client Haven in Bendigo as there is always a surprising amount that can be learned from each other. Later in the year, Haven's Chief Executive Ken Marchingo was benefiting from the strong dollar in Europe and was hosted by City South Manchester Housing Trust. Let us know if you are planning a trip this year and would like to visit any of our clients you read about in the Yearbook, and we'll link you up. We can also help with recommendations on where to get the best coffee - obviously this offer only applies in Australia.

How to Produce a Yearbook

The UIC Yearbook takes a whole year to produce. First there is the collection of photographs and articles and then, at the end of the year, a flurry of activity to pull the whole thing together, get the material to Ontwerp bureau B2B in Maastricht, printing and distribution. If you have something, large or small, for our next Yearbook, we'd love to hear from you.



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- 01 FIRST COPY, HOT OFF THE PRESS AT B2B IN MAASTRICHT
- 02 3000 COPIES ARRIVE IN DERBYSHIRE IN A BIG LORRY
- 03 THEN THEY GET SENT OUT

Helpers



Spider



Sam

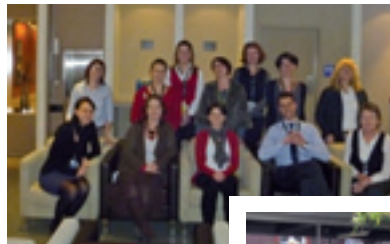


Pro

Alfred Health



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- 01 UNIVERSAL IMPROVEMENT SKILLS, MARCH 2011
- 02 IMPROVE YOUR PROJECTS, SEPTEMBER 2011
- 03 TEAM EVENT, MARCH 2011

Pure Innovations Limited



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- 01 UNIVERSAL IMPROVEMENT SKILLS, JUNE 2011
- 02 STRATEGY DEVELOPMENT EVENT, NOVEMBER 2011



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BROADLAND HOUSING GROUP



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- 01 UNIVERSAL DATA SKILLS, JUNE 2011
- 02 UNIVERSAL IMPROVEMENT SKILLS, APRIL 2011
- 03 UNIVERSAL DATA SKILLS, DECEMBER 2011
- 04 UNIVERSAL IMPROVEMENT SKILLS, JULY 2011
- 05 UNIVERSAL IMPROVEMENT SKILLS, JANUARY 2011
- 06 UNIVERSAL IMPROVEMENT SKILLS, MARCH 2011
- 07 UNIVERSAL IMPROVEMENT SKILLS, MARCH 2011
- 08 STRATEGY DEVELOPMENT EVENT, JULY 2011

Weaver Vale Housing Trust

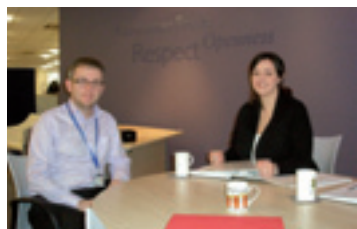


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- 01 CUSTOMER DATA REVIEW PROJECT INITIAL MEETING, JANUARY 2011
- 02 UNIVERSAL DATA SKILLS, MAY 2011
- 03 STRATEGY DEVELOPMENT EVENT DAY 1, SEPTEMBER 2011
- 04 STRATEGY DEVELOPMENT EVENT DAY 2, SEPTEMBER 2011



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- 01 MERTHYR VALLEYS HOMES UNIVERSAL IMPROVEMENT SKILLS, JANUARY 2011
- 02 SALE MOOR COMMUNITY PARTNERSHIP UNIVERSAL IMPROVEMENT SKILLS, MARCH 2011
- 03 GUEST LECTURE AT THE HOGESCHOOL ZUYD, MAASTRICHT, APRIL 2011
- 04 BIRMINGHAM COMMUNITY HEALTHCARE NHS TRUST UNIVERSAL IMPROVEMENT SKILLS, NOVEMBER 2011
- 05 UITP AUSTRALIA NEW ZEALAND STRATEGY DEVELOPMENT EVENT, NOVEMBER 2011

And there's More



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Out and About

- 01 HOWARD BEACH-JFK - LISA
- 02 AUCKLAND - LISA
- 03 KO AWATEA - LISA
- 04 SHINY NEW TRAIN
- 05 ON THE TARMAC AT DUBAI
- 06 SYLV AND RICHARD BROWN
- 07 CROMFORD MILL, BIRTHPLACE OF THE INDUSTRIAL REVOLUTION - SYLV, LOU TRIBUN AND ANDREA
- 08 SYDNEY - LISA AND MADELEINE
- 09 MANCHESTER AIRPORT
- 10 ON THE FERRY IN BRISBANE - DAVE, AZHAR, LISA
- 11 LOOKING GOOD IN ORANGE - IAIN MACDONALD AND MADELEINE
- 12 CANBERRA - LISA, ELLENA AND MADELEINE



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London South Bank University

In March 2011, London South Bank University held a small 'graduation ceremony' for its first group of Facilitators



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- 01 IMPROVE YOUR PROJECTS, MAY 2011
- 02 IMPROVE YOUR PROJECTS, JANUARY 2011
- 03 IMPROVE YOUR PROJECTS, JUNE 2011
- 04 LEONIE CUTS THE CAKE
- 05 SYLV ENJOYS
- 06 CAROL HAS THE MOST IMPORTANT JOB
- 07 IMPROVE YOUR PROJECTS, MARCH 2011
- 08 UNIVERSAL DATA SKILLS, JUNE 2011
- 09 IMPROVE YOUR PROJECTS, FEBRUARY 2011



03 Special Feature

ANNUAL PLANNING AND PROJECT STEERING GRIDS

- The Chief Executive's View
- A Facilitator's Viewpoint
- Directorate Expo Event
- Regaining Control
- I like Annual Planning because
- Delivering Strategy
- Annual Corporate Planning at Haven
- Working with the Board

The Chief Executive's View

Michael Newey

You can put your head in a book and read about all sorts of things, but just because you have read up on something does not mean you can do it. You can listen to a lecture, or go on a course, but just because you have been in the room when someone has talked about something does not mean you can do something. So often the best way to learn is from trying to do it, making mistakes and then trying again. Anyone with small children will recognise this learning cycle. So it is with Annual Planning done UIC style!

Back in 2009 we stormed into our first attempt at Annual Planning with energy and eagerness and got it wrong!

We were very inclusive and ended up with the longest list of projects you will have ever seen on a steering grid. I worked out that, if we were to ever meet our ambitions, we would have had to complete a project about every six working hours of the year. We had proved our willingness to use our new business tools and our collective ambition for improvement, but we had no experience to learn from - we had no familiarity to balance against our enthusiasm.

Second time round in 2010 we were much better - but still not perfect. We ensured that only the right people were involved in Annual Planning and whilst this came at a cost to inclusivity, we ended up with more focussed lists of deliverable projects. Project teams were selected on the basis of what they were going to contribute to the assignment in question - team membership was no longer used for information cascade and inclusivity. We just could not afford the cost of "meetingitis" in either distracting people from their day jobs delivering routine operations or the inherent delays to the delivery of projects caused by the overpopulation of project teams.

Julius Caesar apparently said "Experience is the teacher of all things." Albert Einstein definitely said "The only source of knowledge is experience."

Third time round - 2011 - the jury is still out on whether we will see another huge step up in terms of how we deliver the projects. We have been even more focussed in deciding the content of Project Steering Grids. We have focussed almost exclusively on those that are 'must', 'now' and 'high' and accepted that 'nice to have' is not a good enough reason right now. We are operating in a period of austerity where we have to do more with less; where we have to demonstrate effective use of our resources; and where everyone has constantly higher expectations of us.

Having the right projects with the right resources is absolutely vital to our ongoing success and I hope that we will continue to learn each year how to make the whole process work better for the Group and our customers.

Lastly - a cautionary quote from Mark Twain about the importance of learning the right things from experience: - "We should be careful to get out of an experience only the wisdom that is in it - and stop there; lest we be like the cat that sits down on a hot stove-lid. She will never sit down on a hot stove-lid again - and that is well; but also she will never sit down on a cold one anymore."



Michael Newey
Group Chief Executive
Broadland Housing Group

A Facilitator's Viewpoint

Facilitating Annual Planning at Broadland Housing Group has been an evolutionary process. Now in our third year, there has been a sense of satisfaction from reviewing previous projects and identifying inputs for the forthcoming year.

In particular the opportunity for reflection on challenges and successes has been well received. Feedback from colleagues participating in the planning events has shown that there is greater appreciation for the process this year, as an understanding of the benefits of the approach develops within the organisation.

The Facilitators continue to grow in confidence with each year due, in part, to our Facilitator Network meetings where we exchange experiences and discuss approaches. We recognise that there is still some distance to travel however we are confident that the foundations are in place to



make a success of not just Annual Planning but the resulting projects, which can only be of benefit to the organisation and our customers.

Adam Clark
Broadland Housing Group

Directorate Expo Event

With 40 people in our Strategy and Planning Directorate, it's always hard to cover everything in the rare days when we have everyone together. The feedback from last year was that people wanted to know more about what their colleagues were up to and how they could be involved. This year we tried a new approach and the feedback from staff was excellent.



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After a short introductory Round Robin and some detailed Leader Speaks sessions, we used our team Project Steering Grids as a way to talk about our program of work for the coming year. Prior to the Directorate Event, each of the Managers ran a team planning day and I attended parts of those. At those days, the steering grid for the year was developed or refined. The Managers then brought their steering grids to the Directorate event.

We had the three managers set up in three different areas of the room and the teams rotated around to hear from the managers who did not manage them. I had asked the managers to cover each of the pieces of work briefly and particularly to highlight links to other teams. People were asked to listen for pieces of work that impacted on their daily work or that they were interested in. The third rotation was back to their own manager where everyone talked about what they had seen and what they were keen to be involved in.

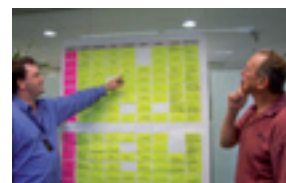
In the 'real work' session in the afternoon, we kicked off a few of those projects on the steering grids that were particularly relevant across teams. Working in small groups, everyone had the opportunity to give their views on what needed to be included or what had already been done on the key projects.

We had a great event, with a good balance of sharing information and doing real work. We'll keep doing this two or three times each year - it helps us stay on track and lets everyone know what's going on, even if it is at the desk next to theirs.

*Sally Stannard
Director Strategy and Planning, TransLink Transit Authority*



- 01 THE DIRECTORATE EXPO EVENT, SEPTEMBER 2011
- 02 BACK IN THE OFFICE - ELEANOR NIGHTINGALE'S BEAUTIFUL PSG



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I like Annual Planning because

- **It reminds** us what we have achieved and what we can do to improve over the coming year
- **I value** the input of my team
- **It gives** people the chance to take responsibility for projects that light their fire

*Sarah Sturmeay
Pure Employment Manager
Pure Innovations*



Regaining Control

Anne Brinkhoff attended one of our public Universal Improvement Skills courses back in 2010. She recently got in touch to let us know she was still using what she learned on a daily basis and to give us an example.

I recently helped a Local Authority to review their strategies and check progress on implementation. Using the Project Steering Grid it was really easy. I wrote every project listed in every strategy onto a post-it note and brought these with me. There was a gasp at the numbers - but very quickly the participants clustered, prioritised, checked the control status, (re)assigned lead roles and went away with a manageable list that could be included in their service plans. They left with a real sense of control.

*Anne Brinkhoff
Programme Manager
Local Government Association*

Delivering Strategy

A few words about the power of strategy development...

The old adage states that 'failing to plan means planning to fail'. I would have to add to that 'failing to plan strategically, implement, evaluate and plan strategically again - means you may as well not do it in the first place'. If you don't know where you are going, or what you will be doing when you arrive, how can you arrange to get there, and what happens if you don't like where you are?

I come from a clinical background and 30 years in the health industry, starting out as a nurse and midwife. Most of my experience was in large public or private health service organisations or government departments, managing teams of staff in complex, challenging, time and resource constrained environments.

About 9 months ago I became the General Manager of accuteque. At that time they were a small family owned and operated consultancy of 16 who specialised in quality assurance, governance and testing with support services of project management and business process management. accuteque use these processes to help organisations improve their business in a sustainable manner, particularly when implementing new software or systems. We work in the finance, banking, insurance, superannuation, advisory, publishing, logistics and petroleum

sectors - very different from running hospitals and state-wide health programs.

accuteque commenced 7 years earlier and developed a great reputation for delivering above expectation, mainly due to the efforts of the founder and owner Caroline Patton who has a vision and focus on value-adding second to none. She gathered together a great team who were primarily involved in delivering great services to clients. However, the internal processes were not so mature. This

is a challenge faced by many small owner/founder companies. The company had been so focused on delivering great outcomes for clients using their specialist expertise that its own strategies had been left a little unloved.

So, Caroline made the brave move of handing the operational management of her company over to me while she went back to doing what she loved most, delivering great service to clients. I was employed with a mandate to grow the company - double the staff and triple the sales - but not to lose any of the quality delivery and to keep the supportive family operated culture!

After a brief review of the internal processes, the first step was obvious - to plan our growth strategy. I wanted to develop accuteque into a learning organisation that practiced its own improvement methodology. I wanted to establish a sound foundation and governance for the company to grow but that also enabled us to take calculated risks, using innovation for ourselves and our clients and rewarding creativity.

For me there was only one choice. I contacted the UIC and we set up a Strategy Development Event. I have used the UIC people and processes for about 6 years or so, mostly in large

projects. But this was the first time that I didn't have to convince management that this is what was needed because I was the management.

Initially some of my senior team were sceptical. Even though they were committed to company growth, this was more an abstract idea than a practical reality. They had attended a 'similar' annual planning event 2 years earlier run by an external consultant. The earlier occasion had lots of promises and no outcomes.

For me the UIC methods are practical and proven. I had absolute confidence this was the way to move the company to the next level. By the end of the first day we had a plan. By the end of the second day we had documented where we wanted to go, how we were going to get there, who was going to do what and when it was going to happen. And for an improvement junkie from way back the most important bit - we had identified how we would know when we had succeeded, so we could start the whole thing again.

The UIC's Madeleine engaged the team, everyone had a say and a contribution to make. The process challenged them, harvested their ideas, filtered the critical work (the Musts, Shoulds and Coulds) and allocated responsibilities and timelines. People went from feeling pessimistic and overwhelmed to feeling optimistic and armed for success.

During the Strategy Development Event we reviewed the vision and mission, revised our values and behaviours and identified six strategies that we believed would get us where we wanted to go. We created major strategic projects and a Project Steering Grid. This was material we could use the very next day when we went back to our jobs. From the sound three page corporate strategy document we have built our internal governance and improvement processes and are well on the way to achieving our strategic goals. The event also challenged us to work as a team and to have our contribution and commitment to the company examined in the group dynamic. It gave me a chance to see how my senior team operated and where I would need to support



The accuteque Project Steering Grid

them, direct them or console them.

Gradually all the company employees are getting a chance to experience the 3 day Universal Improvement Skills course so that they can more readily see why and how we are changing the way we do things. And they can get more involved in internal and client facing projects. We have a Team Event planned for the New Year and have just booked in our 2 day Strategy Development Event to plan for the next year's challenge!

So, 6 months after our first Strategy Development Event and 3 months into this financial year, we have gone from 16 to 30 people (almost double) and sales are up 17% with the forecast for the rest of the year looking even more promising. We still have a strong family oriented commitment to our people and our clients and now we have strategies in place to keep doing things better and better.

*Veronica Strachan
General Manager
accuteque*



Annual Corporate Planning at Haven

Rapid growth at this Bendigo-based Housing Association led Chief Executive Ken Marchingo to look for a more structured approach to corporate planning.

Haven has undergone a period of remarkable growth. Since 1994, the organisation has grown from 1½ employees to 125 and from an annual funding of about \$150K to an operating budget of \$23 million. In the last few years (and from a standing start), we have delivered 1000 new properties worth \$¼ billion. It is fair to say that Haven has been on some ride.

Over that time our CEO Ken Marchingo has personally chaired and driven all strategy and business planning. But, as the complexity of the organisation has grown, so has the need for a professionally facilitated process. This year, for the first time, we have used our talented UIC consultant Madeleine to facilitate our planning session and adopted the UIMPROVE approach to seeing that through.

Haven's Strategy Development Event in April 2011 was the starting point of our Annual Corporate Planning Process UIMPROVE-style.

This event helped drive the following outcomes:

- Seven strategy headings
- Our Corporate Project Steering Grid
- Our very own Annual Corporate Planning Process - all our corporate planning activities designed in a logical sequence

Following the Strategy Development Event, the next two phases of the process - Divisional and Team Annual Planning - followed soon after. This utilised our own internal pool of eleven UIMPROVE

-trained Facilitators. These were paired-up and assigned to each of the Annual Planning events by our Facilitator Coordinator. During May and June a total of ten Annual Planning events were carried out across Haven each producing a Project Steering Grid.

Our Corporate Project Steering Grid is reviewed fortnightly as part of our Executive Meetings with the assistance of one of our Facilitators. It is here that project status and next steps are reviewed and updated. Divisional and Team Project Steering Grids are also regularly reviewed at the appropriate meeting. Our Facilitators are available upon request to assist with project meetings, Kick-Starts, Project Reviews, Refocuses or general advice.



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Communication of our corporate business plan has been a key activity. To help with this, our Corporate Project Steering Grid is available in electronic format to all staff via our intranet and communicated via staff bulletin.

Our already established quarterly project status report process is continued as a reporting mechanism that is fed through our CEO and to the Board. We are very happy with the process and results to date.

Elisa McKnight
Facilitator Coordinator
Haven



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- 01 ONE OF HAVEN'S NEW HOMES
- 02 HAVEN'S CORPORATE PROJECT STEERING GRID. THE STRATEGY HEADINGS ARE THE BLUE POST-ITS.
- 03 STRATEGY DEVELOPMENT EVENT, APRIL 2011

Working with the Board

If someone had told me that using the UIC methodology helped relationships with and within our Board, I would have said that this was a claim that overstated the benefits of process improvement.

My natural instincts tell me that relationships are developed, forged and sustained through human interaction, contact and understanding. I still believe this is true but I now also believe that there is a place for process in building relationships. When I raised this with a few friends at the pub they said I was an anorak and thought I should know how sad I sound.

So, in order to avoid any further well informed philosophical debate about whether this is true for all relationships, I want to illustrate my point.

I have been reflecting on how the introduction of Annual Corporate Planning and the UIC tools and techniques within the Trust has helped relationships both within our Board and with me and my colleagues on the Exec Team.

We are now into our third year of using the Annual Corporate Planning Process. It really helps us to review our strategies, confirm or alter where we are going and convert these strategies into projects and department, team and individual appraisal objectives.

Our Board is one of the key contributors at the start of this process as they, together with the support of the Exec Team, decide the strategic direction of the Trust. I have observed how the framework we now have has provided a road map for the Board and they, indeed we all, can see where we want to get to and how we are going to get there.

Relationships are built on trust and the Board trust this process and our ability and commitment to engage with staff at all levels in the Trust to see it through. I believe this has cemented the good relationship between us.

The UIC tools and techniques used with the Board during the process have also helped relationships between individual members of the Board and have improved their overall effectiveness as a group. For example the use of post-its in Clustering and the process of Traffic Light Assessment help facilitate the decision making needed at Board level. Our members have become used to us using these and other methods and I am convinced that they have helped improve our debate and provide a process for improved governance.

So, I am afraid I may have to cope with the anorak tag, as we will not be giving up our commitment to using UIC at all levels of the organisation. This will improve our processes and I believe help our relationships. This doesn't sound sad to me, just common sense. What do you think?

Steve Jennings
Chief Executive
Weaver Vale Housing Trust



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- 01 STEVE JENNINGS
- 02 IN MARCH, WEAVER VALE HOUSING TRUST DISPLAYED ALL THE ORGANISATION'S PROJECT STEERING GRIDS IN ONE PLACE SO EVERYONE COULD GET AN APPRECIATION OF WHAT EVERYONE ELSE WAS DOING.

04 Public Courses

- Public Courses
- I've been UIMPROVED
- Sense and Simplicity
- Dates for 2012



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- 01 UNIVERSAL IMPROVEMENT SKILLS IN BRISBANE, OCTOBER 2011
- 02 FACILITATOR DEVELOPMENT PROGRAMME IN ALSAGER, CHESHIRE, MARCH 2011
- 03 UNIVERSAL IMPROVEMENT SKILLS IN MELBOURNE, SEPTEMBER 2011
- 04 UNIVERSAL LEADERSHIP SKILLS IN ALSAGER, CHESHIRE, OCTOBER 2011
- 05 UNIVERSAL IMPROVEMENT SKILLS IN MELBOURNE, MARCH 2011
- 06 UNIVERSAL IMPROVEMENT SKILLS IN ALSAGER, CHESHIRE, JUNE 2011
- 07 FACILITATOR DEVELOPMENT PROGRAMME IN ALSAGER, CHESHIRE, SEPTEMBER 2011
- 08 UNIVERSAL IMPROVEMENT SKILLS IN BRISBANE, MARCH 2011
- 09 UNIVERSAL IMPROVEMENT SKILLS IN MAASTRICHT, MARCH 2011
- 10 UNIVERSAL IMPROVEMENT SKILLS IN ALSAGER, CHESHIRE, MARCH 2011

Public Courses

We realised a long-standing ambition in 2011 by running our first public courses in Holland. These were in addition to the courses in Australia (Brisbane and Melbourne) and the UK. We run public courses for two main reasons - to provide an opportunity for individuals and organisations with no previous experience of UIMPROVE to learn the key elements and as a 'top-up' service so existing clients can send new starters. This often provides an interesting mix of practitioners and novices. Here are the course photos from 2011, a couple of articles from attendees and dates for 2012. We try to be flexible with our dates so they can sometimes change. For the up-to-date picture, check out the website.



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I've been UIMPROVED

Public course in Alsager, October 2011, Angela is far right on the front row

What: Universal Improvement Skills
When: 18-20 October 2011
Where: Alsager, Cheshire

After gratefully, if with some scepticism, accepting the opportunity to attend the Universal Improvement Skills course, I am pleased to report that it was a thoroughly enjoyable, thought provoking and ultimately valuable experience on both a personal and professional level.

The organisation I work for, Learning Partnerships, is a Leeds-based charity with over 20 years experience of working in the inner-city to provide opportunities and support for children, young people and adults to access education, employment, training and volunteering.

Our projects are needs-driven and we have a track record of delivering highly successful programmes that support personal development, the journey to employment and community regeneration.

Key project and team leaders within the organisation had already attended the Universal Improvement Skills course so I'd already had a taster of what to expect. However I really needed to participate in the training to fully appreciate how powerful and effective these tools could be in our commitment to driving continuous improvement throughout the organisation.

UIMPROVE is designed to encourage participation from all stakeholders and we have already successfully carried out an Annual Planning event and set up projects that will be under-

pinned by the methodologies, tools and techniques learned to move them forward with real structure.

Coincidentally, our new strap line for the charity is:

'Engage, Inspire, Achieve'.

UIMPROVE did - and I'm sure we will.

*Angela Higgins
 Quality Manager
 Learning Partnerships*

Sense and Simplicity

These words came into mind when I was thinking about what struck me the most in the Universal Improvement Skills course I revisited last week in Maastricht.

As I will be starting a new job in January 2012, I decided to participate in this course for a second time and refresh the knowledge I got from my first course. I intend to make a good start in my new job, and use as much as I can of the methods, tools and techniques I have learned. What I love about the skills is that they make perfect sense and are simple to use. The focus is clearly on getting things done in a systematic way, involving the right people in the right way. The manual is a perfect help, very practical and very complete (and even fun to read and use!) and based on experiences in a great variety of organisations.










The course was great, perfectly organised and presented by Josephine, Andrea and Sylv. They practice what they preach, and are all highly effective course leaders. All participants can experience some of the techniques right away!

After 3 days of learning, doing and also laughing, I feel confident my work will benefit from the UIMPROVE approach.


Helen Derrez

Dates for 2012




Universal Improvement Skills

-  Alsager, Cheshire, 13-15 March 2012
-  Melbourne, 20-22 March 2012
-  Brisbane, 27-29 March 2012
-  Maastricht, 24-26 April 2012
-  Alsager, Cheshire, 19-21 June 2012
-  Alsager, Cheshire, 11-13 September 2012
-  Melbourne, 11-13 September 2012
-  Brisbane, 18-20 September 2012
-  Maastricht, 27-29 November 2012

Universal Leadership Skills

-  Alsager, Cheshire, 9-11 October 2012

Facilitator Development Programme

-  Alsager, Cheshire, Spring 2012 (Module 1: 13-15 March)
-  Melbourne, Autumn 2012 (Module 1: 3-5 April)
-  Alsager, Cheshire, Autumn 2012 (Module 1: 11-13 September)

05 Facilitator Pages

- 5th Annual UIMPROVE Facilitators Conference
- Congratulations and Thanks
- Facilitator Coordinators Interviewed



Congratulations and Thanks

I just wanted to thank the team for a really well organised, stimulating and enjoyable conference.

I really enjoyed the range of levels of people presenting, the practical examples provided of the impact of UIC process - which I found easy to appreciate despite coming from very different sectors, and the opportunities for networking with an interesting group of people, all making a real difference in their areas.

My participation in the Facilitator Development Programme has had a profound effect on the way I think about organisational operation, so much so that I now apply a sort of BC/AD separation of ages to recall of my working life, and am so grateful for having had this opportunity to leave the dark ages behind and acquire a UIC mindset!

LSBU has just risen 14 points in the Guardian League table to #100, and as per our discussion at lunch yesterday, it is hard to measure the impact of the approach, but I like to believe that this must be attributable in some small way to the shift in the awareness of our corporate brain.

Regards,

*John Baker
Finance and Administration
Manager,
LLU+ London
South Bank
University*



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- 13 SOUTH YORKSHIRE HOUSING ASSOCIATION
- 14 NHS INSTITUTE FOR INNOVATION AND IMPROVEMENT AND NHS WORCESTERSHIRE
- 15 PEOPLEBIZ+LTD AND LEARNING PARTNERSHIPS
- 16 JOHN, QUIZ, PINT

The quality of the talks and the story they tell, from some of the more junior in particular, are a testimony to the material you teach and the support you offer them. It is a case study in what happens when people are released from the constraints of their ordinary day job and trusted to do something more innovative and risky. Suddenly they are achieving their potential. It is strikingly different to some more constraining, risk averse, hierarchical organisations who think that they know best and must follow their orders.

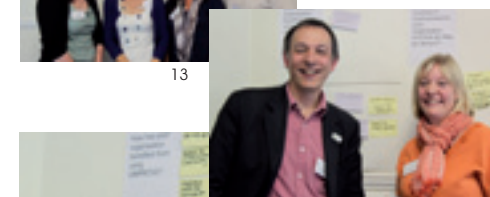
Thanks too for risking putting me on the podium! I hope I succeeded in stressing that although the bulk of what I said is outside the mainstream of UIMPROVE (it would be pointless for me to reiterate your material to this group), I can only do those things because of the grounding and practice in what I have learned from the UIC. I remain flabbergasted at the response from some delegates to the process simulation story and in particular how some seemed almost tearful in their reflections about it. I've still not worked out why that is but it needs developing because I see almost the same response in this group as we experienced in the real thing about which I spoke: emotional engagement, wanting to go and take action. That is what is needed, in the NHS in particular.

Best wishes.

*Andrew Fordyce
Consultant Oral and Facial Surgeon
South Devon Health Care NHS Foundation Trust*



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5th Annual UIMPROVE Facilitators Conference

A word of congratulations to you all for a very well organised and run conference earlier this week. Vicky as ever organised us well (some more difficult than others to herd and I apologise for being one of the more tricky) and kept us to time. You are a company which practices what it preaches in terms of meeting customer needs, while of course injecting some subtle market research and advertising. Very well done.

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- 01 PURE INNOVATIONS LTD
- 02 INCOMMUNITIES
- 03 LONDON SOUTH BANK UNIVERSITY
- 04 BROADLAND HOUSING GROUP
- 05 SOUTHERN AND SOUTHEASTERN
- 06 NHS STOCKPORT
- 07 CITY SOUTH MANCHESTER HOUSING TRUST
- 08 WEAVER VALE HOUSING TRUST
- 09 FIFE COUNCIL
- 10 SOUTH DEVON HEALTH CARE NHS FOUNDATION TRUST AND TORBAY CARE TRUST
- 11 THE REGENDA GROUP
- 12 FIRST GREAT WESTERN

Facilitator Coordinators Interviewed

We at the UIC rely very heavily on some special people in the organisations we work with. The Facilitator Coordinator is a challenging role in an organisation with UIMPROVE Facilitators, and one that enables a Facilitator Network to be used to best advantage. In celebration of these special, hard working, patient and brave people, we thought we would give our Australian Facilitator Coordinators an opportunity to get together and have a break in Melbourne to share their stories. Lisa, Madeleine, Helen Rose from TransLink and Elisa McKnight from Haven met and had a lunch to discuss what it is like to be a UIMPROVE Facilitator Coordinator.

(1) How many Facilitators have you got in your network?

EMcK: Haven has 12 trained and 10 currently deemed active.

HR: TransLink currently has 30 active Facilitators. We have a number off-line due to high workloads or secondments to other agencies.

(2) What are the changes that you have seen in your organisation since training Facilitators?

EMcK: A planned and coordinated approach to corporate Annual Planning, Project Steering Grid discussion at team meetings and in one-on-ones.

HR: Staff in TransLink have very much embraced UIMPROVE. Our former CEO was a huge advocate of the approach and encouraged all levels of the business to get involved. The TransLink Leadership Team are users of the process which has contributed to some great outcomes for our business. People are more outcome-focused and we have cut out the talk fests. We are actively encouraging our delivery partners to get involved and have included Queensland Rail and Bribie Island Coaches so they can train a member of their staff. I have personally experienced the excellent results that come out of a facilitated session and the surprise of some participants on how well it works.

(3) What are the main responsibilities

in your coordination role?

EMcK: Coordinate and assign Facilitators to assignments in a timely fashion, be an advocate for our Network, facilitate fortnightly Corporate Project Steering Grid updates for our Executive Team, identify and act on improving network processes including our intranet site, share knowledge of what the network has to offer Haven, plan and run our quarterly Network Meetings, record keeping and quarterly activity reporting for our Executive Team.

HR: I centrally coordinate the events which are requested via an on-line form on our intranet page. From these requests I allocate a Facilitator and Co-Facilitator. I also run the network which has quarterly meetings to review previous activities, discuss issues, brainstorm ideas for events and undertake refresher training. I also provide metrics on the number of events undertaken since the previous meeting and other metrics of interest. My other responsibility is to promote the network to the business and liaise with colleagues when determining when it is appropriate to have a Facilitator.

(4) What are the facilitation challenges in your organisation?

EMcK: Linking Facilitators to assignments in a timely fashion - our Network is made up of a number of outreach staff so it's sometimes difficult to commit to an assignment.

HR: The biggest challenge for our Facilitators is balancing their 'day job' with facilitation assignments. Some Facilitators see events as an additional workload for no gain. However I think the exposure you get to the business and having a hand in making a difference in TransLink far outweighs the impact on your work. We're also challenged by people not understanding our role, planning events without consulting first and hoping the results will be achievable.

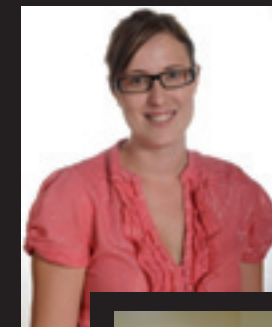
(5) What is your pet peeve?

EMcK: Lack of communication or insufficient notice provided by the person requesting a Facilitator.

HR: I have two. Managers not supporting their staff



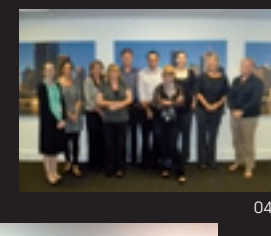
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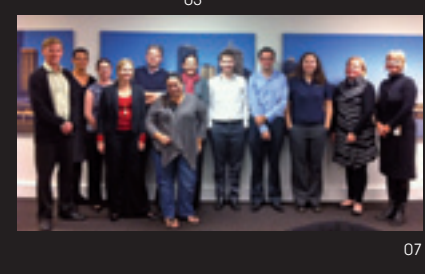
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to undertake events and seeing these events as an impediment to getting their work done. My second is Facilitators not committing to events when they are aware of the expectations before they undertake the training.

(6) Do you have a favourite process or tool for managing your network?

EMcK: I am a big fan of our UIMPROVE projects and facilitation intranet designed by Trevor Perri, one of our Facilitators. The functionality includes an electronic facilitation request as well as an auto-generated notification process.

HR: We also have a Facilitator intranet page which is a great tool to promote the network and manage requests. I also have a team site for the Facilitators only which is where I can promote upcoming meetings and events, put up photos from meetings and provide a place to share agendas and other tools from previous events.

(7) What advice would you give a newly appointed Facilitator Coordinator?

EMcK: Planning is the key to any facilitation assignment. Be clear on the Project Leader's desired outputs.

HR: Get the support of your Leadership Team to ensure they will champion the methodology. Ensure whoever is trained knows what is expected of them and that this is for the whole business, not just for personal gain.

(8) What metrics are you capturing for reporting purposes in the organisation?

EMcK: Facilitation hours, type of event, Co-Facilitator, Methodology, feedback form received, number and type of assignments per division, facilitation requests received, assignments declined by Facilitator, off-line and active Facilitators, pending assignments, facilitation evaluation forms received/not received, requests received (per quarter), Annual Planning events carried out.

HR: Currently I am capturing number of events, time taken for each event, prep time, number of attempts to allocate a Facilitator, any sessions requested with less than 5 days notice, number of Facilitators currently available, number left the organisation and number off-line. I want to expand my metrics to include type of tools used and feedback on the Facilitators' performance. At the moment this information is only provided at the network meetings, however I will be providing a report to our People Strategy Board shortly and on a regular basis in the New Year.



01 HELEN ROSE
02 ELISA MCKNIGHT
03-07 TRANSLINK FACILITATOR NETWORK MEETINGS 2011

06 Systems Update

- A Busy Year!
- City South Manchester Housing Trust - Four Years of Staff Surveys
- Equality Census at London South Bank University
- Kestrel for Yarra Trams
- Kestrel for TransLink

A Busy Year!

It's been a really busy year for our Systems Team on both sides of the world but particularly in Australia. In this section we focus on some interesting developments from 2011, two featuring the use of Noriaki, our survey software and two about new applications of Kestrel, our performance management software.



Rebecca Coates, our first Brisbane-based Systems Consultant who started with us in October 2011

City South Manchester Housing Trust - Four Years of Staff Surveys

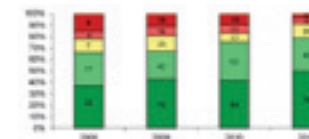
In 2008 Dave Power, newly appointed as Chief Executive of City South Manchester Housing Trust, commissioned the UIC to design and carry out a Staff Survey for the organisation. 2011 marked the fourth consecutive year that the survey has been carried out and, indeed, four years of year-on-year improvement in the results. Here are the eleven questions that achieved a 10% or more improvement on the previous year.

- 1 I am kept informed of what is going on at CSM (+23%)
- 2 I have regular 1-1s with my manager (+17%)
- 3 Managers are open with staff at CSM (+16%)
- 4 We have clearly defined roles and responsibilities (+14%)
- 5 We have clear measures in place that tell us how we are doing (+14%)
- 6 I understand what my colleagues do (+13%)
- 7 We have regular team meetings (+13%)
- 8 CSM is environmentally aware and responsible (+12%)
- 9 I have had the training I need to be able to do my job (+11%)
- 10 I am clear about what is expected of me at work (+10%)
- 11 We work well together as a team (+10%)



- 01 PROJECT KICK-START, APRIL 2011
- 02 EXECUTIVE TEAM EVENT, SEPTEMBER 2011
- 03 UNIVERSAL IMPROVEMENT SKILLS, SEPTEMBER 2011
- 04 STRATEGY DEVELOPMENT EVENT DAY 1, NOVEMBER 2011
- 05 STRATEGY DEVELOPMENT EVENT DAY 2, NOVEMBER 2011

The survey uses the UIC's Noriaki software. The 2011 survey saw 161 responses received out of a possible 174, a 93% response rate. Dave has kindly allowed us to share the survey with anyone interested. You can see the questionnaire at www.theuic.com/CSMSurvey. Ask your UIC Consultant if you'd like to be shown a summary of the finished report.



Example year-on-year comparison - I feel well supported at work.



Equality Census at London South Bank University

Some survey software is more equal than others

The 2010 Equality Act is a major piece of legislation which provides protection for groups ranging from women on maternity leave to different sexual orientations, religion and belief. Like many organisations, at London South Bank we realised that the data we held about our staff did not reflect the range of the protected characteristics in the new Act and we decided to carry out an all staff equality census to remedy this.

We selected Noriaki as our survey tool because we were impressed with the pricing, customer support and insights into survey design. It was important to us that the company we chose to work with were aware of the sensitivities of this project and the UIC with their Noriaki software fully delivered on this. Not only did they help us with the wording of the questions, they also advised on survey promotion and responded helpfully to our requests to keep the survey open for longer to take account of our summer recess period.

When the survey closed, just under 70% of our workforce of 1650 staff had responded, a very good response rate given the sensitive nature of the questions we were asking. We are particularly pleased that we now have up to date data on disabilities and, for the first time, we now hold

data on sexual orientation and marriage/civil partnership status.

The UIC not only produced the survey data but also came and met with us to talk us through the results. For me this added a great deal of value to our analysis of the survey findings, especially the rich data contained in the free text comments. They also worked with our technical staff to ensure the data could be transferred from Noriaki onto our HR database.

Just before Christmas we presented the survey results to our Vice Chancellor and CEO and we are about to share the main survey findings with all staff.

*Leonie Saywell
Deputy Director of HR - staff and organisational development London South Bank University*



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- 01 PRO, ANTHONY O'MEARA, DUNCAN SMITH, DAVE, TROY JOHNSON, AZHAR
- 02 CAMBERWELL DEPOT, RICARDO VANDERPUTT
- 03 JIM NADDA
- 04 TROY JOHNSON
- 05 CITYCAT IN BRISBANE

Kestrel for Yarra Trams one source of the truth

When Keolis Downer EDI was awarded the Yarra Trams operation in 2009, it had big plans for improving performance.

This included establishing a new performance management framework - PRIDE: Punctuality, Reliability, Incident, Delay, Evaluation - and to ensure that they were able to evaluate the causes of incidents and delays on the highly complex Melbourne Tram network, they knew that they needed to ensure they had the right data to hand.

Kestrel was installed in April 2011 and this has allowed Yarra Trams to better understand their processes for managing performance. Now that they have established this foundation, they are able to go about improving the systems, processes and procedures that they have in place for performance management.

In the 10 months that the Performance Management system has been live, Yarra Trams have saved both time and money by having access to the right data. With effective and accurate attribution, Yarra Trams are able to see what is really happening out there on the network.

It is not only the Performance Team within Yarra Trams that have access to Kestrel. Later in the year, it was also rolled out to front-line managers who use it regularly in their day-to-day work. The depot managers, rolling stock, infrastructure, operations and senior management are using one single source of truth for their reporting requirements. Even better, reporting is steadily becoming automated, freeing up managers' time for doing more important things, like improving performance.

Duncan Smith, Yarra Trams

Kestrel for TransLink measuring performance across a multi-modal network

23 December 2011 saw contracts signed between the UIC and TransLink Transit Authority for the provision of Kestrel for the TransLink network of heavy rail, bus, ferry and soon light rail. This will enable us to accurately track the passenger experience across the different modes. We are expecting to make rapid progress during 2012 with very tight development timescales.

*Stephen Banaghan,
Director Rail,
TransLink Transit Authority*



Gordon Buchanan, Steve Banaghan and Danica Fannin, TransLink





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