
Yearbook

Out of the Crisis



- Trust the process
- Steering a path through austerity
- Could this simple post-it note revive our town centre?
- Attack of the giant polo mint
- The eureka moment



The Universal
Improvement
Company

Introduction



Dr Deming famously said "you have to be in a crisis before you pay attention"

2012 has been a year of realisation that the world has changed, the change is here to stay and will continue in 2013 and beyond. Looking at nearly all the articles in 'The Big Picture' section of this Yearbook, the overall theme is change. As a result of this we have noticed a few changes in our order book. During 2012 our existing clients were much more focused - with a reduction in bulk training and an emphasis instead on using us for facilitated events. These have included Strategy Development and Executive Events to set and consolidate direction, Team and Departmental Events to ensure that the rest of the organisation is involved in moving forward. We have also seen a trend of 'quiet to dormant' clients coming back to us for strategy development and refresher and top-up training so that their managers are at their best.

It's been a tough year at the UIC also. We have shared the pain of many of our clients who have reorganised and our finances have been turbulent. For the first time ever in the 20 year history of the UIC, we didn't gain a single new major client in 2012. Not all organisations have the faith to make the leap and the investment that goes with it. It would appear that this is particularly true at times of austerity. Dr Deming also said "survival is not compulsory".

But, let's not get too gloomy. Existing clients have managed to hold things together and, indeed, set bold new directions. They are applying UIMPROVE, its methodologies and tools to secure their futures and this is exciting and rewarding work for us.

This Yearbook, as usual, is not about the work of the UIC - it's about what you, our clients, are doing. There is the usual wide variety of content that will be of use to you whether you are a Chief Executive, Facilitator, Director, manager or other UIMPROVE practitioner. I often say that, when we work with an organisation, we do the same old stuff (I don't normally say 'stuff'). It's in the application by each organisation and the people in it where the real action takes place. Different organisations and people implement UIMPROVE in different ways and therefore there is a lot to learn from each other.

Finally a few highlights for me personally from 2012. I made my 50th trip to Australia equating to over a million miles of flying. The 6th Annual UIMPROVE Facilitators Conference in the UK was the best ever.

Our 1st Annual Performance Conference in Australia was a great success, so much so that, with a fair wind, we'll not only be running this in Australia in 2013 but also in the UK. We ran more Universal Data Skills and Universal Leadership Skills courses in 2012 than in any other year. And, believe it or not, it's not all about me. I am lucky enough to work with great people on both sides of the world - colleagues and clients.

And so I'll close by thanking everyone who has been on a course or attended an event with us in 2012 - you can now skip forward to find your photograph - they're all in here. Also, a particular thank you to everyone who has made a contribution to the Yearbook and a request to everyone to keep the contributions coming. It's great to be able to learn from each other. Finally, all the best for 2013 and keep improving.

*Richard Capper
richard@theuic.com*



The Universal Improvement Company



The Big Picture

In this section, we look at improvement on an organisational scale.

- Broadland Housing Group - Coping with Austerity Britain
- TransLink - A year of change
- First Great Western - The way we do business
- Red Beads
- Weaver Vale Housing Trust - At times of major change, trust the process
- Great Yarmouth Community Trust - Steering a path through austerity, the journey continues
- accuteque - Creating a Common Language and Shared Paradigm
- The Regenda Group

Broadland Housing Group Coping with Austerity Britain

Anyone that has ever been a course delivered by the UIC team will know Key Concept 3 well. "Workers work in the system. The job of the manager is to work on the system and improve it with their help." Myron Tribus' common sense, but frequently forgotten, idea has served Broadland well this year.

Social landlords are currently facing significant challenges. Austerity Britain is not a great place to be if you are on low wages and/or surviving on benefits.

A whole raft of cost cutting, as well as ideological, changes are being introduced by the coalition that will significantly affect any family that relies on any form of state financial aid to make ends meet. These changes will inevitably affect housing association and local authority landlords. In order for our businesses to stay both financially viable and to deliver our organisational purposes, we are having to re-examine what we do and how we do things. We have to work out the most effective ways to support tenants and to help those who need to be our tenants. These new government policies are a game changer - events that fundamentally change the way things are done. The most important thing for Broadland is to ensure that these changes are the right ones and not knee jerk reactions to adversity.

Back in May we established a joint board / executive major project team to oversee the changes we need to make to the way we work. This team identified ten streams of work that needed to be undertaken and we then formed appropriate sub-project teams - each championed by a member of the major project team, with a Project Leader from senior management. The other 30 members of staff, who were the crucial members of the sub-teams, were drawn from across the organisation - we knew that if we are going to make the right decisions we needed the input of the experts in the business - those that actually do the job. Any Chief Executive who considers themselves to be an expert in everything that goes on in the organisation is

The Big Picture

probably a fool! Listening to those that do the job is fundamental.

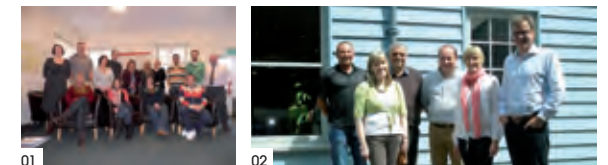
The ten groups reported back to the Major Project Team, who broadly endorsed all of the recommendations they made. There were no surprises as communication had been effective throughout the summer and autumn with regular meetings of the team using UIMPROVE principles and techniques. A subsequent awayday with members of all the Boards in the Group debated and challenged many of the recommendations, but at the end of the day adopted all of them as the way forward.

This was a perfect example of how using UIMPROVE techniques allowed us to work out the best respon-

ses we could make to the benefit cut agenda and the new operating environment. We not only have action plans and new policies that are fit for purpose, but we also have buy in to these proposals having involved those that do the job now and who will do the job in the future.

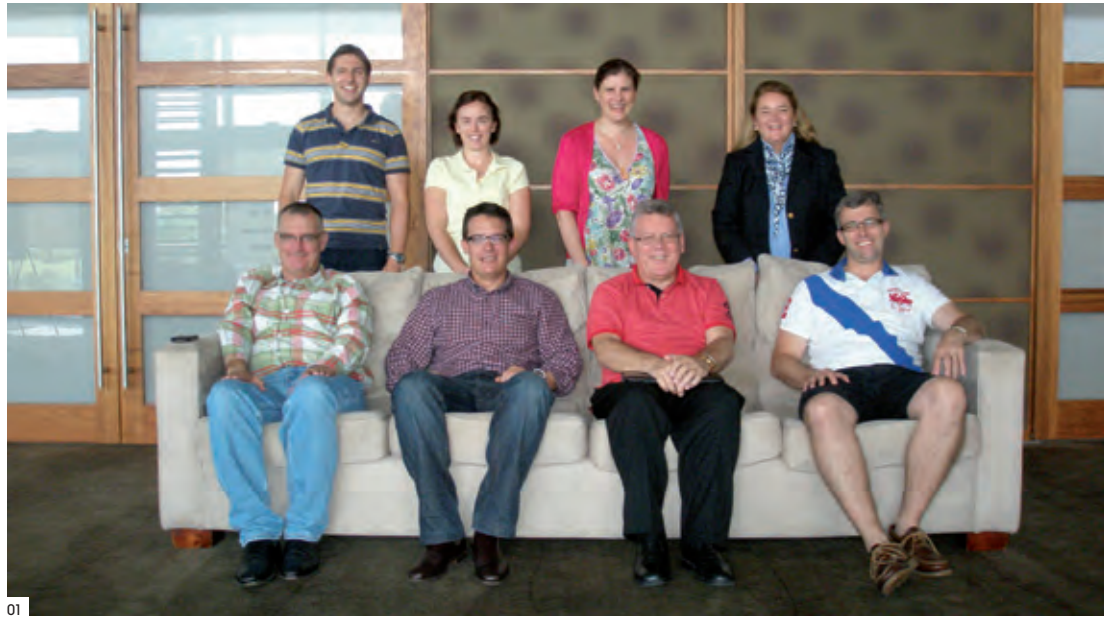
Myron Tribus' conviction that developing new approaches needs the engagement and assistance of 'the workers' is just plain common sense - it doesn't dilute the responsibility of senior managers to make decisions, but the decisions that are made will be based on much better knowledge and greater experience.

*Michael Newey
Group Chief Executive
Broadland Housing Group*



- 01 UNIVERSAL DATA SKILLS, JANUARY 2012
- 02 EXECUTIVE EVENT, JULY 2012
- 03 UNIVERSAL LEADERSHIP SKILLS, FEBRUARY 2012
- 04 UNIVERSAL LEADERSHIP SKILLS, FEBRUARY 2012
- 05 UNIVERSAL LEADERSHIP SKILLS, FEBRUARY 2012
- 06 FACILITATOR RECALL DAY, FEBRUARY 2012





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TransLink - A year of change

I arrived in Queensland, Australia on 8th March 2012 and less than a week later, as the CEO of TransLink Transit Authority, I was working with my new Senior Leadership Team with Lisa and Richard at an off-site workshop for 2 days.

The content was terrific and the techniques employed effective to the point of getting through the team stages of Forming, Storming, Norming and Performing rapidly. They were also good at capturing the essence of working as a collective Corporate Brain to identify and examine future challenges for the business.

There was a fair bit of trepidation at the beginning of the workshop, which is inevitable with a new team and an imported CEO. However, whatever worries there might have been evaporated at the end of the first session, the CV exercise. This might seem a little rudimentary, but it was a really powerful process.

There were also solid integration activities buttressed by 'Real Work', designed to get the best out of the team in a collaborative, non-threatening and supportive environment.

The overall feelings at the end were of energy, sound strategic vision and a workable action plan which had been actually ENJOYABLE to produce and work through. It made you want to meet again for another go!

Another advantage of the UIC is their work is done in a quiet, unassuming manner which makes it much more effective



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and makes teamwork easier to embed.

The workshop made my job so much easier and probably short-circuited 3 months of hard graft. It was well worth the effort and taking the time out.

*Neil Scales
Then: CEO, TransLink
Transit Authority
Now: Acting Director-General,
Department of
Transport and Main Roads*



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01 NEIL (FRONT ROW, THIRD FROM THE LEFT), FRESH OFF THE PLANE WITH HIS LEADERSHIP TEAM, EXECUTIVE EVENT, MARCH 2012
02 SPOT THE DIFFERENCE. MATT (FRONT ROW, THIRD FROM THE RIGHT) AND NEW TEAM, EXECUTIVE EVENT, NOVEMBER 2012
03/04 NEIL, BUS AND TIGER



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Well, where to start? 2012 has certainly been a year of change for TransLink, with a fair mix of challenges for our people, but ultimately one of opportunity to take the organisation to the next level in delivering public transport for our customers.

An early highlight was the arrival of our new Chief Executive, Neil Scales, fresh from Merseyside to the shores of South-East Queensland. Neil's calm demeanour and his unique way of looking at things positioned TransLink well for the significant changes ahead, following the election of a new state government in Queensland.

A new Transport Minister, new Director-General and a Commission of Audit into the state finances set the tone for further changes to the organisation. In July 2012, it was announced that the TransLink brand would grow to cover all passenger transport modes (including bus, rail, ferry, subsidised air services, long distance coaches, taxis and limousines) and the reach of the organisation expanded to cover the entire state of Queensland. Importantly, the new entity was no longer a statutory authority, but a division within the Department of Transport and Main Roads.

The focus of the new TransLink Division is to deliver a single integrated passenger transport network across Queensland accessible to all customers. To deliver on this objective, we have

been very focused on building a new organisation which is responsive to the needs of customers while delivering value for government. The new TransLink Division has grown to more than 450 staff, drawn from five separate organisations and geographically spread throughout Queensland. The Leadership Team and I have been very focused on driving this organisational change and shaping our new strategic direction, which has been slightly more complex with the recent promotion of Neil Scales to role of Acting Director-General of the Department of Transport and Main Roads. As expected Neil is doing a tremendous job in leading the Department, which has given me another opportunity to lead TransLink, a role which I am thoroughly enjoying.

Our friends at the UIC have also been kept busy in 2012, with Kestrel for Queensland Rail, further Facilitator training and a range of interesting work with the larger Leadership Team, our people and also many of our delivery partners to help shape the new TransLink Division.

*Matthew Longland
Acting Deputy
Director-General
TransLink Division
Department of Transport
and Main Roads*



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- 01 STRATEGY AND PLANNING DIRECTORATE EVENT, APRIL 2012
- 02 SERVICE PLANNING AND INFRASTRUCTURE DEPARTMENTAL EVENT, NOVEMBER 2012
- 03 MARKETING DIRECTORATE EVENT, MARCH 2012
- 04 PASSENGER TRANSPORT SERVICES TEAM EVENT, NOVEMBER 2012
- 05 SERVICE PLANNING AND INFRASTRUCTURE TEAM EVENT, SEPTEMBER 2012
- 06 UNIVERSAL IMPROVEMENT SKILLS, MAY 2012
- 07 UNIVERSAL IMPROVEMENT SKILLS, JUNE 2012
- 08 CUSTOMER EXPERIENCE TEAM WORKSHOP, NOVEMBER 2012
- 09 EXECUTIVE EVENT, JULY 2012
- 10 EXECUTIVE EVENT, SEPTEMBER 2012
- 11 PROCESS ANALYSIS EVENT, MARCH 2012
- 12 RAIL TEAM EVENT, MARCH 2012
- 13 FACILITATOR DEVELOPMENT PROGRAMME, NOVEMBER 2012
- 14 ANNUAL CORPORATE PLANNING, MARCH 2012
- 15 MARKETING DIRECTORATE WORKSHOP, SEPTEMBER 2012



First Great Western - The way we do business

FLASH BACK TO MAY 2009 - MARK AND COLLEAGUES ON THE PERFORMANCE IMPROVEMENT PROGRAMME

We at First Great Western have been working with the team at the UIC for several years now. The relationship was born from a business need to improve the punctuality of our train services. The people initially trained worked on our existing systems and processes, as well as implementing new systems across the business. It soon became obvious that, to improve, we needed to listen more to the 5000 or so colleagues within our business who had many of the answers that we needed to improve our punctuality and ultimately improve the service that we provide for our customers.

We have made great strides on punctuality but we are still working to improve it. The concepts and approach that the UIC has brought to the business, along with the skills that the managers have gained through their learning, are now being applied across our business in many areas other than train performance. All of this underpins our five strategic priorities: (1) a better, safer railway, (2) delivering for our customers, (3) our people (4) productivity and efficiency and (5) sustainable partnerships.

Our meetings are now run using UIMPROVE trained Facilitators. This has improved the quality, efficiency and output of the sessions, as well as introducing a degree of consistency across the

departments and directorates. Our senior teams' Annual Plans are now formulated using UIMPROVE methodology and the way we manage projects is now consistent across the business. All of this is really the way we now do business, the aim being to improve our results. Although we have a way to go, the UIC learning programme is now a fundamental part of the development of our people. Earlier this year we were awarded with Silver Status by Investors in People. The training and qualifications we now provide for our people was one of the things the assessors highlighted as good practice when making this award which is something that FGW is really proud of. Working with the UIC has, without doubt, up-skilled our team to run our business more efficiently, improve results and deliver for our customers.

Mark Heffernan
 Head of Organisational Development & Compliance
 First Great Western



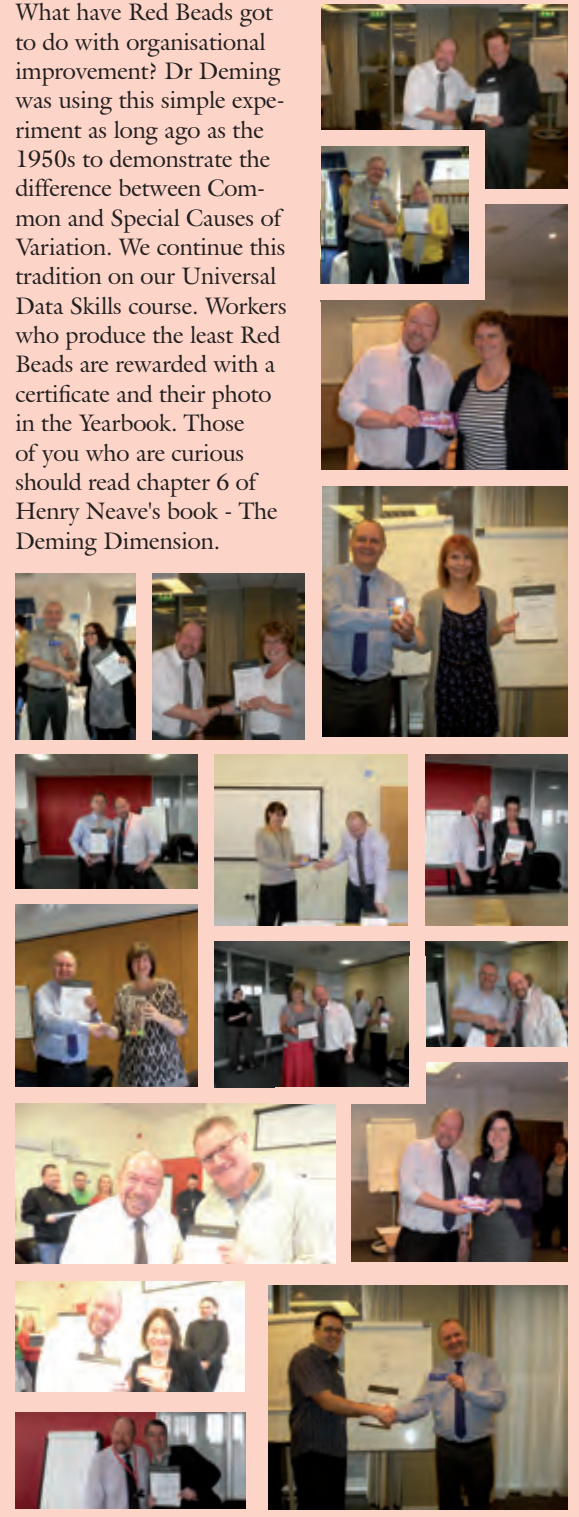
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- 01 UNIVERSAL IMPROVEMENT SKILLS, DECEMBER 2012
- 02 MARK HEFFERNAN
- 03 MARK AND FACILITATORS, BRISTOL NOVEMBER 2012
- 04 UNIVERSAL IMPROVEMENT SKILLS, MARCH 2012
- 05 UNIVERSAL IMPROVEMENT SKILLS, APRIL 2012
- 06 UNIVERSAL IMPROVEMENT SKILLS, JULY 2012
- 07 FACILITATOR DEVELOPMENT PROGRAMME, SEPTEMBER 2012
- 08 FACILITATOR DEVELOPMENT PROGRAMME, JUNE 2012
- 09 UNIVERSAL IMPROVEMENT SKILLS, OCTOBER 2012
- 10 FACILITATOR DEVELOPMENT PROGRAMME, MARCH 2012



Red Beads

What have Red Beads got to do with organisational improvement? Dr Deming was using this simple experiment as long ago as the 1950s to demonstrate the difference between Common and Special Causes of Variation. We continue this tradition on our Universal Data Skills course. Workers who produce the least Red Beads are rewarded with a certificate and their photo in the Yearbook. Those of you who are curious should read chapter 6 of Henry Neave's book - The Deming Dimension.



Weaver Vale Housing Trust - At times of major change, trust the process

Weaver Vale Housing Trust, led by Chief Executive Steve Jennings, has a well-established Annual Corporate Planning Process. A key component of this is a 2 day event held in the autumn of each year, day 1 being attended by Steve and his four Directors and day 2 attended by the next tier of managers.

2013 sees the end of Weaver Vale's existing 5 year Corporate Plan and Steve took the chance in 2012 to re-strategise, initially for the period 2013-2018, later extending this to 2013-2020. This Corporate Plan will see the biggest industry changes in a lifetime. The Welfare Reforms being pursued by the Government will permanently change the landscape in which Weaver Vale operates.

In order to achieve this, as well as the 'standard' 2 days in September, Steve also held a provisional Strategy Development Event in May and a day for the entire management population in December.

But he did have a moment of doubt which he has kindly shared with us.

I am a fan of the Strategy Development and Annual Planning process as it not only makes sense but is an excellent way of engaging colleagues at all levels in the translation of strategy into tangible projects and routine operation. I believe it has also produced improved satisfaction for our customers.

Our latest externally validated satisfaction survey has showed that our customers believe we have improved in virtually all areas of our service delivery. Not all of this will be down to Annual Planning as culture is important too. But projects

often lead to process improvement and for a service based organisation this leads to improved customer satisfaction.

However, I must admit that I was tempted to consider something different this year when I was working with our Board and the Executive team on our new Corporate Plan. The new plan needed to respond to major changes happening in our external environment and involved a significant change to what we wanted and needed to achieve going forward. The changes are well rehearsed within our sector and cover issues such as welfare reform, reduction in publicly funded services and funding constraints. It just seemed to me that the amount of change we had to respond to surely required something more than Strategy Development and Annual Planning could provide.

It was a daunting task to consider how we would rise to these challenges, whilst continuing our journey of continuous improvement. Raising awareness of the challenges with our Board and colleagues in the Trust was and continues to be absolutely necessary. However, it just served to confirm how difficult it is going to be! I pondered long and hard about how we should approach the major change that we

need to go through if we are to meet and overcome the problems coming our way. I shared my concerns with colleagues and they reminded me that I always say to them, to trust the Annual Planning process. I realised that I had committed UIC heresy by not walking the talk!

We have now completed the Annual Planning process with our Board, the Executive team and senior Managers. This has produced a major change to our strategies and has produced clarity around the outcomes we need to achieve by 2020 and the Strategic Achievement Measures we need to have in place for the first year of the new Corporate Plan (2013).

At the time of writing we are about to move to the next phase of our Annual Planning and engage our front line Managers and their teams to concentrate on how we are going to translate this into delivery and change on the ground. And, as we all know, the only way you can improve or change something is through projects. Its going to be a busy year, I will let you know how we get on in the next Yearbook!

Steve Jennings
Chief Executive
Weaver Vale Housing Trust



01/04 STRATEGY DEVELOPMENT EVENT, MAY 2012
05/11 STRATEGY DEVELOPMENT EVENT, MAY 2012
12 UNIVERSAL DATA SKILLS, DECEMBER 2012
13 UNIVERSAL IMPROVEMENT SKILLS, MARCH 2012
14 STEVE JENNINGS
15 STRATEGY DEVELOPMENT EVENT, DECEMBER 2012



Great Yarmouth Community Trust - Steering a path through austerity, the journey continues



Andrew Forrest is the Chief Executive of Great Yarmouth Community Trust. He talks about the tough challenges facing the organisation.

First the bad news: times are tough for the people who access the services we provide as well as for us as an organisation - and they are only going to get tougher.

We are a community owned service delivery organisation. We aim to make a positive difference in people's lives in Great Yarmouth through a mix of public services (like Sure Start Children's Centres and adult education), grant funded programmes (like our work with older people) and traded services (like our childcare). But the pressures are coming from every direction. The needs of individuals and families for the

support we provide is increasing, funding for public services is reducing, the trading environment is stagnant and grants are ever more competitive. I would say that these are the most challenging set of circumstances in which I have ever had to operate. And this is true right across the UK.

In the sector in which the Trust operates, these challenges will only get more complex in the coming years. Cuts in government spending in the UK have only just begun - public services face a radical reshaping in the same way that the coal and steel industries did in the 1980s. While the economy will start to grow, the impact of an ageing population means that the world of non-essential public services will never be the same. The changes we are seeing today will only accelerate over the next few years - and I don't expect them to be reversed in my working lifetime.

Now the good news. This is also a period of real opportunity. We have a chance to embrace a whole new way of working. But how to get there?

(1) We've been building on the UIMPROVE foundations that we laid in 2011-2012. There are some practical add-ons - we've trained Facilitators for the organisation. The senior team have completed their data training (traumatic for some of them!)

(2) We've got a strong, achievable Annual Plan focusing on seven key strategic areas for improvement - a mix of small and large projects from setting up a functioning Health and Safety Group to developing a cross-organisation Management Information System - and we are on track in delivering them.

(3) We've used a range of tools and techniques - e.g. Flowcharting and Ishikawa Diagrams - and are starting to display data in meaningful ways. Meetings continue to improve - although we want to improve them further. We are now working through Improvement Methodologies systematically (rather than just the bits we like doing).

As we have to continue to change, UIMPROVE provides us with an effective framework. And it's paid off. During 2012 we've won a 4 year contract to run four Children's Centres, transferred 44 employees from other organisations into our own, restructured across 85% of the organisation, achieved Investors in People status and expanded our childcare business.



Facilitator Development Programme, May 2012

I have to admit to being a bit cocktail partied out - but we are now getting to a point where we are doing fewer. Focusing on what the data says takes a lot of stress out of the day job.

So why is UIMPROVE working for us? That's simple - because it is grounded in those 12 Key Concepts that I have found myself coming back to them time and again:

Change is required - never more so than in today's climate!

Plan - Do - Study - Act. Don't just act, resist the temptation to take short, unplanned short cuts based on intuition alone because there's so much work to do.

The 85-15 Rule - the key change in attitude - focus on process and engage employees, volunteers, and customers in shaping the processes that underpin the services we provide. We're even using the distribution of response to change and the Sigmoid Curve to begin to understand how we should plan and deliver services that change people's lives for the good.

Tough times and getting tougher! But, with the framework of UIMPROVE to shape the changes we have to make, I think we are becoming a stronger and more resilient organisation. Change? Bring it on!

Andrew Forrest
Chief Executive
Great Yarmouth Community Trust



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- 01 UNIVERSAL IMPROVEMENT SKILLS, JANUARY 2012
- 02 UNIVERSAL DATA SKILLS, SEPTEMBER 2012
- 03 SETTING THE STRATEGIES - STRATEGY DEVELOPMENT EVENT, FEBRUARY 2012



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accuteque - Creating a Common Language and Shared Paradigm



Veronica Strachan is the Managing Director of accuteque, a professional services advisory firm. A strong supporter of the UIC, Veronica has taken the approach from her days managing complex health organisations into the corporate world.

accuteque is an Australian advisory firm who offer Organisational Improvement and Quality Assurance to businesses across multiple sectors - health, transport, finance, insurance, government, utilities, resources and many others. We help small, medium, large and global organisations by using project and change management, business analysis, quality assurance, governance and testing to reveal, recover and realise their vision.

Since I began at accuteque some 20 months ago we have grown remarkably, moving from a small family operated business to a professional firm of 36 employees. We made a conscious choice to plan our growth strategically and to use the UIC as part of that growth. Having used the UIC myself for a number of years in project roles, I was confident the methodology and tools worked and that they



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would be eminently suitable to use operationally for this organisation who had a strong logical, analytical and highly IT literate employee group.

The UIC facilitated our first, second and soon our third Strategy Development Event. It is important that all our employees have an understanding of how the company operates, how it can and does manage improvement and how they can be a part of this change. Using UIC methods and in particular the Universal Improvement Skills course gives everyone a common understanding of the way accuteque approaches quality, improvement and projects.

All accuteque permanent employees and many of our contractors attend Universal Improvement Skills within 6-12 months of commencing with the firm. This establishes a common improvement language; is part of our commitment to training employees and provides learning in so many useful and practical UIC tools and techniques that can be used every day either within the firm or on their client sites.

It still amazes me when I have to go into a meeting without an agenda and have people arrive with no means of recording a note about the meeting or any action they may have to take. This does not happen if the meeting is run by accuteque!

This use of the UIC for strategy development and Universal Improvement Skills courses for accuteque teams is an approach that fits really well with our company value

to respect all people and our goal to be a Learning Organisation. accuteque uses Systems Thinking in our internal and client facing interactions.

Systems Thinking is a philosophy based on the belief that the best way of understanding the component parts of a system and their problems is not by looking at that part in isolation and in terms of cause and effect, but by looking at it within the context of the relationships with other parts and within the overall structure or system that contains those parts. Dr W Edwards Deming (no need for introduction) wrote the foreword to Peter Senge's The Fifth Discipline - The Art and Science of a Learning Organisation which is a key text in this area.

Everyone from novice to expert comes back from Universal Improvement Skills having learned something new. The common language and shared paradigm we create by using these courses as mandatory training alongside the Strategy Development Events are part of our team learning, they give us a filter or lens to help view the overall system that is accuteque; they help us challenge our mental models.

*Veronica Strachan
Managing Director
accuteque*



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- 01 TEAM EVENT, JANUARY 2012
- 02 UNIVERSAL IMPROVEMENT SKILLS, DECEMBER 2012
- 03 STRATEGY DEVELOPMENT EVENT, FEBRUARY 2012
- 04 UNIVERSAL IMPROVEMENT SKILLS, JANUARY 2012

The Regenda Group

Regenda's journey of evolution continues at a pace. Now in our second annual planning cycle, things couldn't be more joined up and aligned to our new corporate plan launched in 2012. This year, as a consequence of our 2 days away with the UIC at our Strategy Development Event, we have reduced our previous 12 strategies to four! Our thinking had moved on to such an extent that we recognised the shift we needed to make to lift our thinking up even higher.

Our learning from the Universal Data Skills courses has seen us move from about 50 Key Performance Indicators to 18. And these are just the start of trickling down to the rest of the organisation to review performance measures that directorates and teams use.

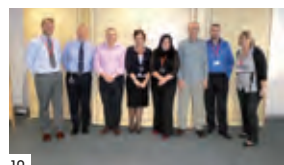
We have trained a further five Facilitators, so we now have a pool of 16 across the organisation. They are absolutely pivotal to the way we do things at Regenda.

Our new ways of working have fundamentally changed the way we work together across the organisation, absolutely for the better.

*Tracey Wilson
Executive Director, Business Improvement
The Regenda Group*



- 01 EXECUTIVE EVENT, JANUARY 2012
- 02 BERNARD GALLAGHER AND DENISE
- 03 UNIVERSAL DATA SKILLS, MARCH 2012
- 04 FACILITATOR RECALL DAY, OCTOBER 2012
- 05 UNIVERSAL DATA SKILLS, APRIL 2012
- 06 FACILITATOR NETWORK MEETING
- 07 STRATEGY DEVELOPMENT EVENT, AUGUST 2012
- 08 UIMPROVE RECALL DAY, OCTOBER 2012
- 09 UNIVERSAL DATA SKILLS, APRIL 2012
- 10 UIMPROVE RECALL DAY, OCTOBER 2012
- 11 UNIVERSAL DATA SKILLS, MAY 2012



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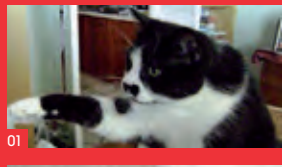


Variety is the Spice of Life

In this section, we look at specific projects and initiatives that our clients have been up to alongside some things that caught our eye during 2012.

- Cats
- Haven
- Could this simple post-it note revive our town centre?
- Attack of the giant polo mint
- Out and about
- London South Bank University
- Praise indeed
- Pure Innovations Limited
- South Yorkshire Housing Association
- Family planning with post-its
- The Dorset Olympics
- Riverside
- Symphony Housing Group
- Bus Stops of the world
- Tips for employee motivation
- 125 mph
- Let us know if you are on the other side of the world
- How to get to Auckland
- Cheers!
- Back on track
- City South Manchester Housing Trust
- Royal Institution of Chartered Surveyors
- Jetstar
- Data discussion
- Statistical Process Control with the Great Don Wheeler

Cats



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- 01 NEXT TIME YOU ARE BORED, HAVE A LOOK AT CATSTHATLOOKLIKEHITLER.COM
- 02 WILLIAM IS A FREQUENT VISITOR TO THE BROADLAND HOUSING GROUP TRAINING ROOM
- 03 SPIDER'S 16TH BIRTHDAY
- 04 THE ST. NEOTS STATION CAT

Haven



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- 01 BOARD STRATEGY EVENT, MARCH 2012
- 02 PROJECT EVENT, NOVEMBER 2012
- 03 STRATEGY DEVELOPMENT EVENT, APRIL 2012

Could this simple post-it note revive our town centre?

When the new Leader of Fife Council decided that reviving town centres was an immediate priority, the Kirkcaldy Area was given the challenge of organising a Town Centre Summit that would bring together the local private and public sectors within 3 weeks. Luckily, Area Services Manager, Danny Cepok is an advocate and long time associate of the UIC and knew exactly what to do - organise a Kick-Start. What he didn't expect was over 120 people and a former British Prime Minister to turn up to a Cocktail Party.

Kirkcaldy, like most seaside towns, has suffered a period of decline over the past two decades. The development of a retail park and the unstoppable rise of internet shopping have changed shopping habits forever and the current double-dip recession has been the final nail in the coffin for Kirkcaldy's traditional High Street. A new approach is needed and, following the recent Council elections in Scotland, the new administration for Fife Council decided to make the high streets of Fife's two biggest towns, Kirkcaldy and Dunfermline, a top priority.



The Council wanted to make a start before the summer by holding a 'summit' in each town centre. That left only a few weeks to organise the event. But Fife has a long history with the UIC and knows how to kick-start a project. Working with the



local Business Improvement District company, Kirkcaldy4All (a public-private partnership that aims to improve the town centre), almost 400 invitations were sent out to local businesses and voluntary organisations in the town. A few days before the event, over 80 people confirmed they would attend. On the evening, over 120 actually turned up, including the editor of the local paper, the Fife Free Press. The event was held in the Council Chamber at Kirkcaldy Town House and eventually the extra people had to be seated in the public gallery overlooking the Chamber. Like all good Kick-Starts, there was a Briefing Session on the subject. Kirkcaldy benefits from having a prominent MP, the Right Hon. Gordon Brown, former Prime Minister and a former Chancellor of the Exchequer, who formed part of the opening session bringing a great deal of kudos to the event. The Leader of the Council also spoke along with the Manager of Kirkcaldy4All, demonstrating that this was to be a partnership between business and the Council.

As the event started at 17.30, there was a break where the participants were given sandwiches and light refreshments, during which the chairs were cleared out of the Chamber and replaced by exhibition boards holding the flipcharted prompts. When the participants returned, I took them through the Cocktail Party rules.

The Editor of the Fife Free Press describe what happened next in his double page special in the following edition of the paper:

"SELDOM has the Council Chamber buzzed with such activity. The summit on our town centre brought people into the heart of the Town House - businessmen, developers, pub owners, restaurateurs, retailers, pressures groups, plus officers, Councillors and Gordon Brown MP. And there's every chance the transformation could begin with something written on a humble post-it note!" This has given the Kirkcaldy Partnership the best possible start it could have had. We are following this up in the New Year with some training for the Partnership members so we can set up the projects and get the improvements underway.



Danny Cepok
Kirkcaldy Area Services
Manager
Fife Council

Attack of the giant polo mint



Out and about



01 VISITING MAUREEN DOMINEY
02 GOODWOOD
03 BRUSSELS AIRPORT

London South Bank University



IMPROVE YOUR PROJECTS, JUNE 2012

Praise indeed



NEIL GETS HIS MANUAL

Event in July 2012

It couldn't have been as bad as last year"

Michael Newey, Chief Executive, Broadland Housing Group - Speaking about his Strategy Development

"I thought this post-it note business was a load of old b0770cks, but it really works"

Neil Scales, new in post as Chief Executive of TransLink, March 2012

Pure Innovations Limited



STRATEGY DEVELOPMENT EVENT, OCTOBER 2012

South Yorkshire Housing Association

Universal Improvement Skills for Graduates

Seven interns working on seven different projects for up to 12 months may seem like a silly idea. Guess what? That is exactly what we, at South Yorkshire Housing Association, have done!

This is part of our contribution towards helping ease the youth employment crisis. It is also an investment to invigorate key projects stalled or not started due to lack of resource. Part of the appeal of recruiting graduates is that they have a variety of skills that we may not already have within our association.

In line with our Annual Plan we identified different areas where we felt we could make improvements to the way we work. This included working on improving internal communication, introducing an electronic document management system, looking at the impact of welfare reform and introducing a procurement work flow system amongst others. Many of these are interlinked.

At South Yorkshire Housing Association we pride ourselves on being an innovative association that is committed to learning and providing development opportunities. For our graduates this is where the UIC come in.

After just one day working with us the graduates were whisked off to attend the 3 day Universal Improvement Skills course. We made the decision fairly early on to have this as part of their induction programme. The graduates are working on key projects across the association so it is vital we all speak the same language - the language of UIMPROVE. So when we talk about Cocktail Parties they don't expect a G&T!!

When taking up their roles the graduates were able to hit the ground running with the tools

and techniques that we use on a daily basis and what they would need to ensure a successful project.

The initial feedback has been extremely positive with all of the graduates wishing that these skills were taught at university, particularly when they were planning their workloads and working on dissertations. They were also quite surprised at how simple the Project Methodologies actually turned out to be and how flexible they were. A key aspect for many was how to get the best from the people around them by involving others and getting the information from them that they require.

reorder post-it notes and flipcharts then they must be doing something right. Aside from that, a follow up day in 2013 will give them a chance to feedback to a panel on how the Project Methodologies have been integrated into their projects and what they have achieved. For us we are confident that the training will be extremely positive and beneficial for all involved now and in the future. Of course the proof of the pudding will be the outcomes, especially the successful outcome of their projects.

*Ian Shepherd
Performance and Planning Manager
South Yorkshire Housing Association*

Has it helped? Well just looking at how many more times we have to



01 UNIVERSAL DATA SKILLS, JANUARY 2012
02 UNIVERSAL DATA SKILLS, MAY 2012
03 UNIVERSAL IMPROVEMENT SKILLS, NOVEMBER 2012
04 UNIVERSAL DATA SKILLS, DECEMBER 2012

Family planning with post-its

Sheryl attended our public Facilitator Development Programme in Melbourne. Proving once again that post-its can be used for many purposes, between Modules 1 and 2 she decided to put her new found skills into practice. Sheryl works for Haven in Bendigo, a housing and homelessness organisation.

I have recently completed the Facilitator Development Programme in Melbourne and, like most of us (I hope it's not just me!), I came out of it wanting to turn my whole world into flipchart paper and sticky notes. So what better way to practise my new skills than to put my family through Annual Planning. I cleared our Saturday afternoon and, despite some moans and rolling eyes, got my husband and two children together to let them know how this works. I still hadn't convinced them at this stage that this was going to be fun.

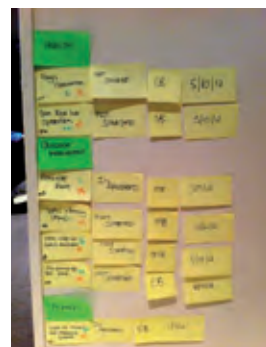
We headed into the Round Robin by Brainstorming and each of us yelling out an idea for what we wanted to do for the next financial year. I was facilitating and putting the ideas on sticky notes. This was when I started hooking them in. The ideas were great and the kids came up with things that I had never thought they would want to do. We kept going around in a Round Robin until the ideas started to become a little strange. The sticky notes ranged from 'concrete the barn' to

'get a big remote-controlled puppy' and a lot of things in between. We then clustered the ideas into themes, indoor and outdoor home improvements, holidays and day trips, socialising, hobbies, health, alpacas (we have four of them) and, of course, miscellaneous. Once in their appropriate themes we then prioritised with Must-Should-Could and Now-Soon-Later. Before we knew it we had a Project Steering Grid along with Project Leaders, start and finish dates. Somehow the big remote-controlled dog didn't make it. We were all very happy with our Project Steering Grid and couldn't wait to start our allocated projects.

We finished it off with another Round Robin to see what everyone thought. Of course the kids loved it and they took great pride in knowing they had a hand in what we do as a family. My husband (the ever keen budgeter) was suitably impressed and started crunching numbers so that each of us knew our budget for our allocated project.

Just over 3 months on and we have ticked off several things from the Project Steering Grid and we're getting ready for a Cocktail Party to work out where and what we want to do for our next family holiday. It's amazing how often you can use these tools and techniques in your everyday life. I love it!

Sheryl Batrouney



The Dorset Olympics

Graham Kerridge is a Senior Service Manager for the British Red Cross. He first came across the UIC when he completed a Strategic Improvement Programme back in 2011 and has gone onto use his skills in many situations including planning the British Red Cross involvement in the 2012 Olympics for the Weymouth site.



Hi Alison and Andrea,

I just wanted to let you both know that all your training last year has not gone to waste.

UIMPROVE has been really useful in helping my team manage the build up to the Olympics in Dorset this summer.

In the final couple of days before we moved out to the Weymouth campsite, the Ishikawa Diagram gave birth to a 'Son of Ishikawa' where each post-it was broken down further to individual actions and responsibilities. The whole of the staff canteen in Dorchester was a mass of flipcharts and post-its.

It meant that everyone in the team could see what had been done, what tasks needed to be completed and in what order too. It was very useful for the weekly briefing and allowed anyone to walk up to my desk and instantly see the current state of play.

It all worked and we delivered. We have now recovered from the Olympics but it has taken 6 weeks for us to return to normal again.

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



Riverside



01

02

01 INTERFACE EVENT BETWEEN RIVERSIDE CARLISLE AND CARLISLE CITY COUNCIL, JUNE 2012

02 UNIVERSAL IMPROVEMENT SKILLS, MAY 2012

Symphony Housing Group



Project Kick-Start, May 2012



Bus Stops of the world



- 01 PERTH
- 02 UQ LAKES, BRISBANE
- 03 PARRAMATTA
- 04 NASHVILLE
- 05 CANBERRA
- 06 MAASTRICHT

Tips for employee motivation



- 01 FIRST, SING TO THEM
- 02 AND IF THAT DOESN'T WORK

125 mph



- 01/02 STEVE BAILEY AT FIRST GREAT WESTERN VERY KINDLY ARRANGED FOR A CAB RIDE FOR LISA AND MADELINE FROM PLYMOUTH TO LONDON PADDINGTON IN MAY. TOP SPEED 125 MPH. THANK YOU TO STEVE AND LEADING DRIVER PAUL MCMILLAN (PICTURED WITH MADELINE AND LISA ON ARRIVAL AT LONDON PADDINGTON).

Let us know if you are on the other side of the world

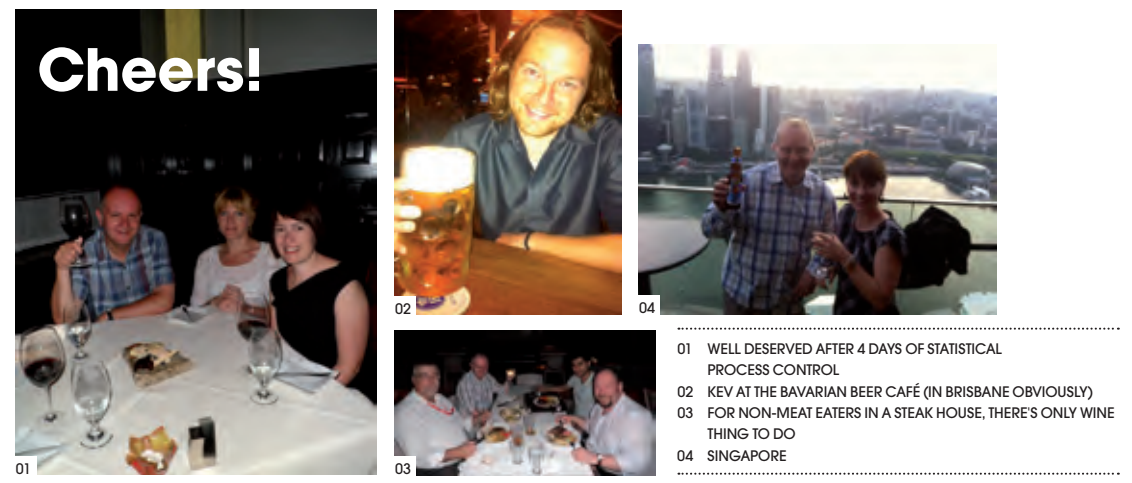


- 01 WHEN MADELINE AND LISA WERE IN LONDON, MAUREEN SHOWED THEM SOME GRAPHS ABOUT PERFORMANCE
- 02 WHEN MAUREEN WAS IN AUSTRALIA, LISA AND MADELINE TOOK HER TO THE BEACH AT MIDDLE PARK



How to get to Auckland

- 01 WALK TO BELPER STATION AND CATCH THE 14.59 TO DERBY (156 414)
- 02 15.20 DERBY - ST. PANCRAS (222 013)
- 03 ST. PANCRAS
- 04 PICCADILLY LINE TO HEATHROW
- 05 QF002 TO SYDNEY (A380)
- 06 AN HOUR OR SO ON THE GROUND IN SINGAPORE FOR REFUELLING (AND A SHOWER)
- 07 SYDNEY FROM THE AIR
- 08 QF141 ON TO AUCKLAND - SHAME MY SUITCASE WASN'T ON IT
- 09 BED
- 10 ENJOY



- 01 WELL DESERVED AFTER 4 DAYS OF STATISTICAL PROCESS CONTROL
- 02 KEY AT THE BAVARIAN BEER CAFÉ (IN BRISBANE OBVIOUSLY)
- 03 FOR NON-MEAT EATERS IN A STEAK HOUSE, THERE'S ONLY WINE THING TO DO
- 04 SINGAPORE

Back on track

Louise Oldnall is a Head of Service at Birmingham Community Healthcare NHS Trust and an advocate of using UIMPROVE to deliver improvement in all the services she is responsible for.

The Learning Disabilities Service of Birmingham Community Healthcare NHS Trust provides a range of community and in-patient care pathways. We cover the City of Birmingham with a population of about 1 million. About 10 000 of those people have a Learning Disability. About 4000 of them will be on our caseloads at any given time.

We have been on a journey to redesign our service to create a multi-professional approach to care and make us more competitive in these times of financial constraint. We want to ensure that we are flexible enough to meet new demands and challenges.

The UIC trained twelve of the team as Facilitators and many more of us did the Improve Your Projects and Universal Improvement Skills courses in 2009 and 2010.

During 2010 we used UIMPROVE to kick-start a number of projects across the service with a great level of success.

However, things came to something of a halt in 2011 and we were forced to recognise that, even with a successful Kick-Start, projects don't steer themselves. There were groans of 'project overload' and 'death by post-it'.

It was quite a task to get back on track, but along came the Facilitator Conference in the spring of 2012.

Everyone's stories reinforced the need to facilitate throughout the lifespan of a project, reminded us that projects should be generated through the Annual Plan and taught us to value our Facilitators more.

Thank you to all the organisations that presented at the conference and shared their experiences of stalling but managing to get going again. You showed us how vital it is to embed the methodology into the infrastructure of the organisation so that it becomes 'this is how we do things around here'.

We learned how important it is to acknowledge the usefulness of Facilitators and therefore the need to ensure that their time is used constructively throughout the life of a project.

This year, we have achieved a number of facilitation tasks of which we are proud using UIMPROVE:

- Forensic Annual Planning
- Forensic Conference Plan
- Review of an Assessment and Treatment Care Pathway
- Project Refocus
- Project Kick-Starts
- Tools for Analysis to continue to improve existing work streams

Perhaps next year it will be our turn to inspire others as you inspired us at the Conference.



01
02
Birmingham Community Healthcare NHS Trust

01/02 FORENSIC EVENT

City South Manchester Housing Trust



- 01 FACILITATOR RECALL DAY, JANUARY 2012
- 02 UNIVERSAL IMPROVEMENT SKILLS, MARCH 2012
- 03 ASSET MANAGEMENT DEPARTMENTAL EVENT, NOVEMBER 2012
- 04 EXECUTIVE EVENT, NOVEMBER 2012

Royal Institution of Chartered Surveyors

Taking UIMPROVE techniques on the road



Imagine the scene - I am in Edinburgh and have just been asked to facilitate a workshop the next morning with 25 people about the future of the public and third sector. The people come from at least 10 different countries and not all speak English as a first language. I will have 1 hour to facilitate a discussion and to work out some key strategic recommendations for one of the attendees to report back to the main conference.

As a well-trained (?) follower of UIMPROVE, I promptly send out for flipcharts, post-it notes and flipchart pens. I get the conference centre to remove all the tables from the room and I condense the covering paper into seven questions. I know that the only way that we will get anything useful from the 60 minute session will be by using and stretching some UIMPROVE approaches. In other words I plan an oversubscribed Cocktail Party in a room that is far too small and without sufficient wall space.

The result was reminiscent of real alcoholic cocktail parties only to the extent that, as I feared, the room was too small and people had some chal-

lenges moving around and seeing the many post-it notes that people - unfamiliar with this approach - were plastering across the walls. Within 15 minutes we had over 250 post-it notes, which then condensed down to 21 areas of real concern and recommendations as to how they might be addressed. Rules such as no overlapping and keeping the post-it notes in straight lines had been abandoned, purely because of lack of time and space. But in an amazing amount of time really good quality ideas had been developed and nobody had sat on the side-lines.

We would never have got this level of engagement and contribution using any other technique that I can think of.

Over the past year I have used UIMPROVE techniques, especially Cocktail Parties, for focus groups to consult Chartered Surveyors about the future strategic direction of our professional body, The Royal Institution of Chartered Surveyors. The RICS is now a global body with over 180 000 members working in 149 different countries, so any techniques need to be internationally and culturally transferable in order

to work. In 2012 I have facilitated groups in China, India, The Middle East, Poland, Netherlands, as well as around the United Kingdom. My experience has proven to me that common sense approaches - and let's be honest, so many of the UIMPROVE techniques we all use are common sense - work with a very wide range of people in many different countries. Cocktail Parties might not be the most exciting technique, but they work. They ensure that everyone contributes their ideas; they make it easy for people to say what they think; they protect debates from getting hijacked by one or two opinionated individuals; and they help good consensual decision-making.

Many of the hundreds of people I have worked with around the world wouldn't recognise the phrase 'Cocktail Party', but they would advocate the virtues of flipcharts and post-it notes. I suspect many of them now have their own supplies of both. Common sense ideas are catchy when they work!

*Michael Newey
President Elect
Royal Institution of
Chartered Surveyors*

Jetstar



TEAM EVENT, DECEMBER 2012



Data discussion



SHARRON DYETT AND TRACEY WILSON

Sharron Dyett (South Yorkshire Housing Association) and Tracey Wilson (The Regenda Group) are both Housing Association Directors in organisations that have embraced the UIC's approach to data. In 2012, both of their organisations embarked on a number of Universal Data Skills courses for their Chief Executive, Directors and Senior Managers in a bid to drive improvement 'from the top'. In August, Vicky caught up with them both and asked them to reflect on what they had learned through this process.

First of all, why did your organisation choose to run data training?

Tracey: For us, it was the natural flow from the other things we'd done with the UIC such as the Strategic Improvement Programmes and several Universal Improvement Skills courses. We also noticed at our Strategy Development Event that our SAMs (Strategic Achievement Measures) and PIs (Performance Indicators) weren't telling us much - so every month we were looking at 46 PIs but we had a 'one size fits all' approach to looking at and presenting these. We wanted to improve on this. We also wanted to pick up on our Improvement Projects and the part that data plays in them.

Sharron: There are lots of similarities for us, particularly around the projects. One thing that came to light was the way lots of managers embrace UIMPROVE but skirt around the first bit around collecting data. Also, we weren't sure our approach to generating data was forensic enough - it's a bit of a fillip where we churn out some numbers each month, but it felt like we'd stopped seeing them.

What were the immediate benefits of attending the course?

Sharron: Talking about data! It gave us a focus to have the conversation about data and challenged some of us an enormous amount. In fact, we're still having the conversation now.

Tracey: Individually for me the 'wow' moment was that it's not that complicated - it's just that we don't measure or present data in the right way. So organisationally, we then gave ourselves permission to do things differently. We now recognise that we can do this better and that doesn't mean we've been doing a poor job to date.

What do you think will be the long-term benefits of attending this course?

Tracey: Better information that tells us the story and enables organisational improvement so that we're looking at the right things. We hope to be less driven by meaningless targets and should see better customer satisfaction and better motivated staff. The Board should also feel greater reassurance that we're doing the right things. At the last team meeting we changed five of our PIs and we plan to review the entire KPI suite. We will then cascade this down and have a collective PI suite for the whole organisation. But we recognise this is a slow process and are looking at 3-5 years for this.

Sharron: It's similar for us. We want to get to a place where we are looking at the right things. It will take us quite a while. Data is now a regular item on the Leadership Team agenda. We have done something

to generate discussion at each Leadership Team meeting since embarking on the training e.g. one Director got people to show data examples from his team, we invested in the SPC software and we reviewed the Don Wheeler book.

What were the light bulb moments on Universal Data Skills for you?

Sharron: Using Pareto Charts to present data - we have used this more than anything else! And SPC (Statistical Process Control) was powerfully presented and has brought science to something we were just dabbling around with.

Tracey: There were lots! Averages are a poor way of looking at things - Common Cause versus Special Cause - Don't try to analyse something until you've got seven data points. And moving away from benchmarking - we should just be looking at ways of improving the organisation, and should constantly strive to do this no matter what other people are doing.

Do you see data in a different light now? If so, what's changed?

Tracey: I'm better equipped to question it without people getting sensitive. I can challenge people with the 'so what?'. We're using it to identify key projects where we see trends.

Sharron: I agree that we're better equipped to question as an organisation and I am far more aware of how we present data. We're working more towards wisdom, via data, information and knowledge. Wisdom, when we get there, is the nirvana.

Following Universal Data Skills, did any of your KPIs seem inappropriate?

Sharron: Our voids turnaround data is geared to lots of rules. It allows you to benchmark but it doesn't really tell you how you're performing. Also, with our complaints process we have a 14-day 'target'. We did an SPC chart of the response rate and it was clear that we simply worked to this target.

Tracey: For us, the cost per unit for voids is flawed. We look at the average cost over a period of time but there are so many nuances.

If there is one thing from this course that you wish you'd learned 10 years ago, what is it?

Tracey: The different ways to present data and understanding Standard Deviations so you wouldn't waste so much time in stupid conversations!

Sharron: It's the same for me. We often end up discussing averages and Common Cause variation when we should be focusing on other things.

And finally, what one message would you give to another organisation considering running Universal Data Skills?

Sharron: Do it! Do it soon if you want to get people engaged in project methodologies from the outset.

Tracey: I agree - just do it! Build it into the holistic approach. Also remember that to truly embed it, it has to come from the top.

Thanks to Sharron Dyett, Housing Services Director, South Yorkshire Housing Association and Tracey Wilson, Executive Director Business Improvement, The Regenda Group.

Statistical Process Control with the Great Don Wheeler

In October, Lisa, Madeleine and Richard journeyed to Knoxville, Tennessee for 4 days of Statistical Process Control with the Great Don Wheeler, author of many books including *Understanding Variation*, a must-read for all improvement professionals.



MADELEINE, DON, HISTOGRAM, LISA

Public Courses and Conferences

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 2012 along with some thoughts from attendees and the dates for 2013.

We also run two conferences - our Annual UIMPROVE Facilitators Conference and Annual Performance Conference. Book your places for 2013 now!

- Public courses in 2012
- The eureka moment
- Manuals made with love
- Dates for 2013
- The 1st Annual Performance Conference
- The 6th Annual UIMPROVE Facilitators Conference



01



02



03



04



05



06

Public Courses in 2012

- 01 FACILITATOR DEVELOPMENT PROGRAMME IN MELBOURNE, APRIL 2012
- 02 UNIVERSAL IMPROVEMENT SKILLS IN ALSAGER, CHESHIRE, MARCH 2012
- 03 UNIVERSAL IMPROVEMENT SKILLS IN MAASTRICHT, NOVEMBER 2012
- 04 UNIVERSAL IMPROVEMENT SKILLS IN BRISBANE, MARCH 2012
- 05 FACILITATOR DEVELOPMENT PROGRAMME IN ALSAGER, CHESHIRE, SEPTEMBER 2012
- 06 UNIVERSAL IMPROVEMENT SKILLS IN ALSAGER, CHESHIRE, SEPTEMBER 2012

The eureka moment

September was a revelation when I participated in the public Universal Improvement Skills course. Being from the rail industry, it was great to meet like minded people and others from an entirely different field and learn about issues relating to residential property management and printing. Attending this course emphasised that whatever the diversity of workplace challenges there are two things that can affect what we do, the people we work with and the processes we use to work with them.

A colleague and friend of many years who works for the UIC enthused so much about the material she was offering to attendees, that I could not resist asking if I could come and see for myself. I wasn't disappointed! The 3 days were packed with content, all of which would be relevant in any industry and all of which was really easy to pick up. Some of the sections included some of those 'eureka moments' where you ask yourself; why on earth didn't I think of that? Many of the concepts were so simple, you had a foot pointing toward

the door in readiness to go and try the methods out for yourself. Since September I have often considered the principles that Dr Deming held dear and used it in my thinking on individual employee cases. This has helped me to rationalise the deeper issues when performance (mine and others) does not reach expectations. Since September I have used flowcharts to explain systems and have been much better prepared for meetings. I have the manual to refer to if I get stuck and this has been particularly useful when stripping a process back as part of an improvement project. The downside is that it has made me quite critical of other techniques I see people use, particularly management meetings and minutes,

follow ups and action lists. In summary, very worth while. You can go on the course and take one thing from it or you could take a hundred. Either way, value for money is assured and the benefits in the workplace will be as much as you like.

Brian Smith



Manuals made with love

One of the exciting things about public courses is that you never know who might turn up. On the September 2012 Universal Improvement Skills, delegates were treated to the company of George Dawn - the owner of Mensa Printers who produce our manuals with love. We asked the ever obliging George to write a few words about what it's like to be a supplier to the UIC and what he'd taken away from the course.

I am sure it will come as no surprise to those who know the UIC that this article was written using post-it notes.

Over the past couple of years it has been my privilege to come to get to know the UIC as Mensa Printers have assisted them in producing manuals and notes for the courses they run. UIC manuals are a perfect fit for us - we warehouse them electronically which allows very little physical stock to be held. This means that updates can be made swiftly. It is also a great help to us that the courses are properly scheduled so we can anticipate what will be needed, where and when.

A client who thoughtfully suggests ongoing improvements to the product is a joy. The idea of using a slightly larger hole to bind the sheets

means it is easier to turn the sheets. This means the manual is easier to use (so it might be used more) and it has a longer life expectancy. I am amazed how difficult it is to persuade other clients to adopt this no-cost improvement! By making a small change to the way binders are supplied we have seen a significant increase in quality without an increase in cost. Small things but all leading to a product we can be proud of.

So, having printed a lot of manuals, it was wonderful to have the opportunity in September to visit the UIC in Alsager and see for myself how a course is delivered. As a person of great curiosity who enjoys examining systems, it was fascinating to discover a new range of tools for taking processes apart and improving them.

Here at Mensa Printers, I am fortunate to be surrounded by people who are very good at organising themselves, and me. I have also found a new friend in UIMPROVE who loves the jobs I hate. Using a few post-its allows me to put the important

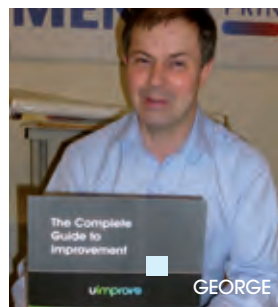
distractions to rest for later inclusion in their rightful place so giving a chance to think clearly and freely.

By creating a process for thinking things through, it removes the option to hide behind technology instead of getting on with the task at hand, so I have to make progress.

And let's face it, you can get a whole lot of post-it notes for the price of a software application. And so, after three very full days, I had a glorious drive home through the Cheshire countryside inspired and enabled to be more effective.



CAROLINE



GEORGE



The 1st Annual Performance Conference

The 1st Annual Performance Conference was held on 22 February 2012, kindly hosted by our fantastic lawyers, Middletons, at their Melbourne offices on the 23rd floor of the Rialto Tower. With a remarkable variety of top quality speakers, the conference attracted a wide range of attendees from all modes of transport and nearly all states and territories of Australia. The conference was run with the help of and in collaboration with UITPANZ. The UITP is the global advocacy organisation for public transport with an aim of doubling public transport patronage by 2025.



Dates for 2013

<p>Universal Improvement Skills Melbourne, 19-21 March Maastricht, 16-18 April Alsager, Cheshire, 23-25 April Brisbane, 10-12 September Alsager, Cheshire, 1-3 October Maastricht, 19-21 November</p>	<p>Universal Leadership Skills Alsager, Cheshire, 1-3 October</p>	<p>Facilitator Development Programme Alsager, Cheshire, Spring (Module 1: 22-24 May) Alsager, Cheshire, Autumn (Module 1: 17-19 September)</p>
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Professor John Stanley,
*Adjunct Professor,
University of Sydney*

John presented a different viewpoint on managing performance and had some ideas as to how things should be managed to meet the needs of a rapidly expanding population.



Stephen Banaghan
*Director Rail,
TransLink Transit
Authority*

Steve gave us the Authority perspective from Queensland and talked us through the recent journey TransLink and Queensland Rail have been on with on-time running.



Norman Gray
*Chief Operating
Officer, Public
Transport Division,
Department of
Transport (Victoria)*

Norman gave us the Authority viewpoint from Victoria and took us through their approach to improvement via the Network Development Partnership which involves both the Authority and the Operators in the decision making process.



Duncan Smith
*Network and
Performance Director,
Yarra Trams*

Duncan gave us a very honest perspective about the challenges faced by Yarra Trams and how a focus on data analysis can lead to improvements in performance.



Maureen Dominey
*Operations Performance
Manager, London
Overground Rail Operations
Limited*

Maureen travelled all the way from London specifically to speak at the conference. Her presentation showed that sometimes simple changes can dramatically improve performance but that a structured approach is needed to see real changes.



Anna Chau
*Principal, Booz
Consulting*

Anna took us through the key recommendations she makes to both Authorities and Operators when asked to analyse performance based on her extensive experience working on both sides of the world.



Hector McKenzie
*Director of Public Transport,
Department of Transport,
Victoria*

Hector dispelled a number of myths around Performance Management to set the scene for the day. His key messages were that cooperation between Authority and Operator was essential in order to achieve success and that one size will not fill all states, territories or networks.



Andrew Lezala
*Chief Executive Officer,
Metro Trains Melbourne*

Andrew talked us through how Metro have seen real improvements in all areas of their business by analysing processes in their 'Visualisation Rooms' and expressed the importance of good leadership when going about any performance improvement drive.

On-time running

At the time of the conference, I was at the beginning of a project to evolve the organisation's current on-time running performance management capability to the next level. Attending the conference was very useful as it provided valuable insights into some key aspects to focus on within my project. It was interesting to see, across the various transport operators (and different modes), the approaches each organisation had taken (and where they are at on that journey) to solve what is a relatively common problem. The presentations by the speakers who shared their practical experiences from their own quests to improve performance were also very interesting. Overall it was very enjoyable and time well spent with a great opportunity to meet people from other transport organisations.

*Paul Gleeson
Queensland Rail*

Quality information and hilarious delivery

I really enjoyed the conference because it gave me the opportunity to meet my counterparts in other jurisdictions. I was interested to learn that, despite some significant differences in our public transport operations and modes, we all face similar challenges and it was very useful to compare our different approaches.

A standout for me was Maureen's presentation about London Overground (LOROL). It appears the right balance has been struck between incentives and penalties in their regime. On-time running performance has been improved from 91% to 96% at the same time as doubling the frequency of services from every 30 minutes to every 15 minutes and in some cases from every 15 minutes to every 7.5 minutes.

I also loved the presentation by Duncan Smith from Yarra Trams, not only for the quality information, but also the hilarious delivery.

*Danica Fannin
TransLink*

The 6th Annual UIMPROVE Facilitators Conference

The 6th Annual UIMPROVE Facilitators Conference was held on 14-15 May 2012 in Sheffield. The conference is one of the highlights of the UIC calendar and you can find a video of each of the speakers on our website. The 7th Annual UIMPROVE Facilitators Conference will be held on 13-14 May 2013.



Andrew Forrest
*Chief Executive of
Great Yarmouth
Community Trust*

As you can read elsewhere in the Yearbook, Andrew's organisation has faced a major cut in their funding. At the same time, he and his team decided to adopt UIMPROVE wholesale and in his presentation he explored the rapid transformation that he's taken his organisation through since then.



Bernard Gallagher
*Chief Executive of
 The Regenda Group*

Bernard first started using UIMPROVE in January 2011 when he and his Executive Team attended the Strategic Improvement Programme and he has gone on to implement the approach across the whole Group where it is known as 'The Regenda Way'. Amongst other things, Bernard covered:

of us. We had set up several new projects and so many Kick-Starts took place we ran at capacity. We had to be strict and make people follow the correct procedures to request a Facilitator. This left enough time for everyone to plan workload, we didn't want facilitation to become something we had to do as part of our jobs but something we enjoyed doing alongside our day jobs.

- The journey from 'fishing trip' to implementing The Regenda Way
- Transforming Group Annual Planning
- What difference having Facilitators has made to the organisation
- Moving from managing the 15% to managing and improving the 85%
- Leading UIMPROVE from the top

I put the success this time around down to having procedures and the support of a Director who assisted in issuing work to Facilitators as well as attending our monthly catch-ups and dealing with any problems that came about. These changes made all the difference and facilitation is now well and truly a part of City South Manchester's culture.



Sharon Georghiou and Tamsin Cooper
The Regenda Group

Sharon Georghiou and Tamsin Cooper are Facilitators at The Regenda Group and picked up where Bernard left off linking day-to-day facilitation with the big picture. Sharon and Tamsin began their training in 2011 and since then have been part of a thriving and active team of Facilitators. Their presentation explored how Facilitators are used in The Regenda Group and focussed particularly on some of their more challenging assignments.



Steve Bailey
*Head of Operations
 First Great Western*

Steve Bailey is Head of Operations at train operating company First Great Western which operates suburban, rural and long distance trains across a vast swathe of England from London Paddington to Penzance and into South Wales. Steve talked about how he and his organisation are applying UIMPROVE in a highly complex operational environment and what his experience has been of managing Facilitators in his team. He was particularly honest about his own initial resistance to 'another training course' and what changed his mind.

Nicky Thurlbeck
*Head of Nursing at
 Great Ormond Street
 Hospital*



Nicky Thurlbeck was trained as a Facilitator at South Devon Healthcare NHS Trust in 2006. 6 years on and Nicky found herself in a fresh environment, as Head of Nursing at Great Ormond Street Hospital, where nobody around her has heard of UIMPROVE. Nicky talked us through the challenges and opportunities she faces as a 'lone voice' in a new organisation.

Tom Lamb
*Cost Surveyor
 City South Manchester
 Housing Trust*



When I started at City South Manchester Housing Trust around 2½ years ago, facilitation was not a word that was used often. We had trained a number of staff as Facilitators, but we had no system in place to make a request for one - people would just ask around and the same few ended up doing most of the facilitation.

I was asked to go on the Facilitator Development Programme and, at first, I didn't really know what the role would entail or how I would be used. After the first module it all started to come together (even after the late nights and over-eating). When I got back to the office we decided that, in order to make the training useful, we would have to set up a network and put some processes in place to ensure Facilitators are used effectively. We set up a request form that was the first port of call if anyone in the business needed a Facilitator; we also put all the previously trained Facilitators on a refresher course. In order to keep all the Facilitators (eight in total) connected, we arranged a monthly Facilitator Forum to share ideas and discuss any issues. This has proved an effective tool to keep the Facilitators up-to-date with what was going on across the business. In the first few months of facilitation the workload almost got the better

Lou Tribus
*Daughter of
 Myron Tribus*



Once again we were privileged to be joined by Lou Tribus, daughter of one of our great heroes, Myron Tribus. In 2011 Lou talked about how she had been using improvement principles as a teacher at Ravenstone School in London. This year she picked up the thread and talked about 'finding learning in unexpected places'.

A fantastic learning opportunity

The Annual Pub Quiz always brings out the competitive spirit in the conference participants. It's always a lot of fun but there are always tears at the end when the winning team explains why they have chosen their selected charity for the prize. We were happy and moved to receive the following letter from Louise Oldnall at Birmingham Community Healthcare NHS Trust.

Dear Richard

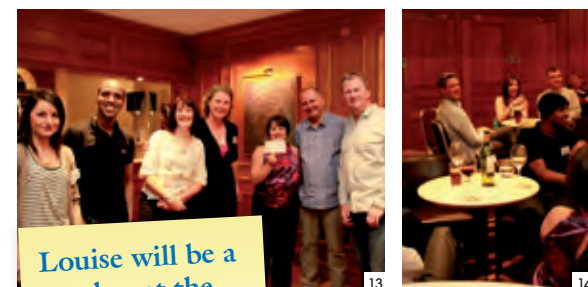
Thank you for providing a fantastic learning opportunity by organising the Facilitators Conference. I was amazed at how much I was able to learn from other industries that I would have previously thought alien in relation to sharing issues with healthcare.

Not only did I learn a lot but I also had a lot of fun - always helps with the learning experience!

Thank you also for your very generous donation of £250 for Breast Cancer Research which is dear to my heart currently as one of our colleagues has recently been diagnosed with such a cancer.

I look forward to meeting up with Andrea soon and seeing you at next year's conference.

Louise Oldnall



13 THE WINNING TEAM - LOUISE AND CHEQUE THIRD FROM THE RIGHT
14/15 THE PUB QUIZ



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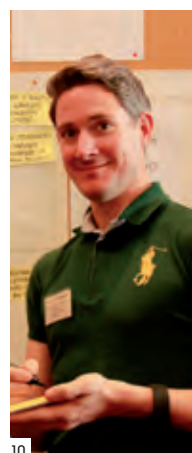
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- 01 CITY SOUTH MANCHESTER HOUSING TRUST
- 02 GREAT ORMOND STREET HOSPITAL AND CAMBRIDGE UNIVERSITY HOSPITALS NHS FOUNDATION TRUST
- 03 FIFE COUNCIL
- 04 THE REGENDA GROUP
- 05 WEAVER VALE HOUSING TRUST
- 06 FIRST GREAT WESTERN
- 07/10 LONDON SOUTH BANK UNIVERSITY
- 08 GREAT YARMOUTH COMMUNITY TRUST
- 09 THE QUESTION AND ANSWER PANEL
- 11 BIRMINGHAM COMMUNITY HEALTHCARE NHS TRUST
- 12 LIVERPOOL HOUSING TRUST AND CONTOUR HOMES

Desire



KEVIN (RIGHT) AND BROADLAND HOUSING GROUP COLLEAGUES

Good Morning Lisa,

I wanted to send my thanks for what was a very informative and enjoyable conference.

It was evident that a lot of thought and planning went in to the whole exercise and that the quality of speakers along with the opportunity to freely converse with fellow users of the UIMPROVE doctrine was invaluable. Added to which, I hadn't expected returning from the 2 days with such a desire to be facilitating something again.

Please can you pass on my appreciation to Richard and your colleagues? Wishing you have a safe journey home and a happy time in your new home - once you get to see it!

Kind regards

Kevin Gee
Intensive Support
Coordinator (East)
Broadland Housing Group

Warts and all

Hi Vicky,

I said I'd have a look at the conference webpage. I have, as have Belinda and Bev, and we've nothing to suggest. It seems a good record of events. General feedback from the three of us on the conference:

What worked well?

- The speakers were great, everyone brought their own individual style and experience.
- I particularly valued the 'warts and all' candidness.
- The highlight for both Belinda and me was Nicky Thurlbeck - Belinda adds 'engaging with the health sector is really important for us so good to hear a bit about their world, culture and challenges'. For me it highlighted the importance of corporate leadership from the top.
- For Bev, she took comfort from the organisations that, like us, had experienced false starts and wilderness years. Also, the fact that having different groups of staff who were either committed, ambivalent or open to persuasion chimed with her.

Not so well

- Having to go the dentist and missing day 2!
- The intros seemed a bit unwieldy - can we sharpen these up?

Next steps for us

- Follow up on Universal Data Skills - we see this as an incremental process rather than a 'big bang'
- Continue to build on the process - ensure that all the broader approach and variety of tools are used - not just Kick-Starts

Speak soon.

Ian Shepherd
South Yorkshire Housing Association



BELINDA, IAN AND BEV

Challenged with a challenge



Ashley Bray started work with First Great Western as a Customer Host in 2000. His present role of Customer Experience Manager led him to attend Universal Improvement Skills in 2011 followed by the Facilitator Development Programme in 2012 which further supports his responsibility as Operations Apprentice Senior Mentor. It was a joy to hear Ashley review his experience on Module 2 of the Facilitator Development Programme and we've asked him to share it with you.

"Please present a business challenge to a group of foreign students at the Exeter University in 2 days time." I was told by my manager.

Who's being challenged here I thought! Glancing over my desk I see my UIC manual. I picked it up and leafed through it as I have done on more times than I can remember following the Universal Improvement Skills 3 day course and Module 1 of the Facilitator programme.

Before I tell you what I did I would like to go back to the 3 day course I attended with Sylvia and Alison. I was fortunate to have the opportunity when a place became available at the last minute. This course was with the senior team at First Great Western. Being a relatively new manager this was out of my comfort zone.

The skills, processes and concepts on the course blew me away! How clearly I could view the company, where I fit in and what we, as a business, could do to improve! Everything on the course made it so simple to look at a problem and how to improve our business successfully project-by-project. It was great to see the whole group embrace the ideals and this shared learning and analysis of the company formed good working relationships and provided an excellent networking opportunity.

The courses are not just improving FGW. I truly believe they improve individuals and encourage consistency and a joined up approach. Everything I do has a UIC influence whether personal or work related. I question and challenge company processes then suggest alternatives with passion and enthusiasm. As more of FGW are introduced to the UIC I find I come across more and more improvement the UIC way.

I am now on the Facilitators course with Josie and Alison. Following the UIS course I wanted more exposure to the UIC! Module 1 gave me the thirst to get out there and facilitate and support others to make a difference, using methodologies that I have experienced, to show others there is another way that is so simple and successful.

Back to the challenge. In just one afternoon I had a full plan to tackle what I had been set using the tools from the Facilitators course. At this point I felt more confident, as I believe in the tools and techniques. On arrival at the university I met five other challenge holders from other businesses and the students who are graduates studying business management.

Each group got together to make a start. After using a Round Robin of introductions I presented the challenge and background information on FGW. All students commented on how hard the challenge was and where to start. Well I knew exactly where to start; Project Worksheets and then with a scoping session!

45 minutes into the session we had to stop for the students to go and explore other challenges and steal ideas! The elected Project Leader had to remain with me, so they could present my challenge to others that popped in. This she did using the Project Worksheet.

Facilitator Pages

- Challenged with a challenge
- Faulty facilitation
- We survived
- We now have another network to run!
- Pastures new 1
- Pastures new 2

On returning to me 20 minutes later my group commented on our progress and the other groups who had nothing to show them or discuss! We continued with the scoping session until all ideas had been exhausted.

They then clustered-by-theme and took out any duplicates. Following this we populated a Project Steering Grid and prioritised using Must-Should-Could and Now-Soon-Later. Next an owner for each project was agreed. This gave the team a tool with which to present back to me their approach to the challenge, and then to the rest of the groups. We were limited to 3 hours including the 20 minute walkabout. In that short time they had a full and comprehensive response to my challenge.

Comparing their work to others they realised how well they had done. Other groups adopted a traditional meeting style approach and had not organised their thoughts or a full improvement plan in response to their challenge.

The organisers of the event walked around all challenges and were amazed at my group's success. They asked many questions on the UIC process.

I believe, had I too approached the day with a traditional meeting style, the group would not have developed such a comprehensive and structured response.

I feel I am making a positive contribution to FGW that will benefit both customers and our business. I would like to thank Sylvia, Alison, Josie and the UIC. I have been enriched by their knowledge, experience and enthusiasm. These new skills will remain with me through my working career. You have really helped me progress from a new manager to one that is confident and understands where I fit in!

Ashley Bray
Customer Experience Manager
First Great Western

Faulty facilitation

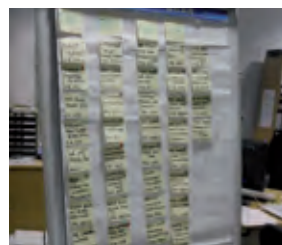
Hi Josie

After completing the first module of the Facilitator Development Programme with you and Ali, I decided to try out some of the tools and techniques I had gained on a small meeting with my manager, Sara Rogers (Station Manager, West), and her assistant Helen Goodson.

We wanted to assess the outstanding property faults in the West of Cornwall, some of which had been outstanding for some time. First I wrote down each fault on a post-it under the station name and the date it was reported. The list was quite long and, because I didn't have two flipchart stands along with very little wall space, we improvised by using the back of the office door. We then worked through the list and colour coded each post-it, red for 'priority', blue for 'needs attention' and green for 'low priority'. We then went through each post-it and gave them a number. These numbers were then transferred to another post-it so that they could be allocated to the correct department to be taken forward.

This was a productive session that got the job done. The lessons I learned were - it takes time to do things properly, the need for adequate space and the correct equipment, and finally to keep the focus on the topic rather than digressions - no matter how interesting!
Regards,

Cathy Lester
Team Organiser for Plymouth & Cornwall
First Great Western



We survived



Lesley completed the Facilitator Development Programme in September

2012 and needed to organise an event to bring three regions of First Great Western together to identify what the engineering works taking place during Easter 2013 would mean for them.

Update on yesterday..... Josie we survived! :-)

Jo who was to be our lead Facilitator had been taken ill at a late stage so we had to move quickly and put plan B into action. Sally became the lead Facilitator supported by Emma and I became the third pair of hands. Not ideal but I managed to juggle it quite well with the other duties I had as organiser.

Seriously it went very well and both Barry and I were very pleased with the positive attitude and engagement from the attendees. Many post-it notes were used and I now have the wonderful task of trawling through each to cross reference with the current actions log. Any new ideas or actions will be going on there.

There were a number of team members and key players, and even a couple of attendees who had been on the UIC courses and therefore familiar with the tools. This meant I was only really required to explain the Cocktail Party to

one group and then facilitate the Clustering-by-Theme and Project Steering Grid.

We had a few teething problems at the beginning of the day - missing a few essentials that were left back at Swindon in Jo's UIC bag - but we overcame these and learned a few lessons about our ability to adapt. Also how invaluable blu-tack is! The agenda timings could have been a bit more flexible but we managed to get refreshments delivered earlier for the planned break so once the Cocktail Party started drying up we could break. This worked out well for us and gave us extra time that was well spent on the Clustering-by-Theme and Project Steering Grid.

Also a note to myself, personally check the rooms allocated before the day and arrange a visit beforehand. We had asked for one main room and two break out rooms and because we use a third party to book venues, the hotel can be a little reluctant to deal with you directly by phone. Basically the room I used previously for a workshop had been split into three so we were not able to adopt our original approach of using the corners of the main room for three Cocktail Parties. Easily sorted though as we switched the rooms allocated and this worked well.

Barry held a review with the team members, key players and Facilitators after all had left. Some mentioned the above points but in a positive way as they did not have a negative impact on the day. We all came away happy with work completed to take us to the next stage.

Thanks to both Sally and Emma for being great Facilitators and ready to adapt easily.

Lesley Colman
Projects Interface Co-ordinator
First Great Western



We now have another network to run!



George Hart was tasked with the role of the Facilitator Network Coordinator for First Great Western back in 2011. Since then he has organised and supported the use of the Facilitators within the wider organisation right across the First Great Western network.

When Mark Heffernan asked me to take on the role of the Facilitator Network Coordinator, I had no idea how quickly our extended Network would grow. We now have 48 trained Facilitators in First Great Western and over the last 12 months our Facilitators have been assigned to over 50 events including many Kick-Starts, Annual Planning, Cocktail Parties and also supporting some of our leading managers in writing their Project Remits.

My role is to make sure that all of our Facilitators get a fair bite of the cherry which means, once I receive a request via our intranet for help, I need to put names to assignments. Due to the size of our regional network it is vital that I allocate the assignments quickly and efficiently. I'm also a great believer in using Facilitators from different areas allowing relationships across the train and facilitation network to build. We have big challenges ahead of us but we know that we have a team ready and waiting trained with tools and techniques that will take us all the way.

Pastures new 1

Elisa McKnight was one of the first UIMPROVE-trained Facilitators in Australia. As so often is the case, Elisa has since moved organisations and has kindly shared with us her experience using UIMPROVE in her new role.

In January 2012 I started my new job with Bendigo Health as an Advisor for People and Culture in the Human Resources department. Although Bendigo Health has had no previous exposure to the UIMPROVE Projects Framework and tools, I have certainly taken my knowledge and facilitation skills with me and have been able to apply these skills in my new role.

I have instituted sharing expectations for meetings and importance of a meeting agenda and always lead by example by preparing professional meeting agendas for any meetings I organise.

I have also incorporated UIMPROVE principles in our strategic planning by ensuring that 'Organisational Values' are linked into it and have created a presentation for the corporate orientation program which demonstrates those links. We have also aligned the strategic planning processes and cascaded the values right down to individual performance plans.



The Tools for Planning and Organising, in particular Brainstorming, Must-Should-Could and Clustering-by-Theme, have been a great asset in learning a new role and getting it under control. I have facilitated a number of sessions in my new organisation, from risk management identification in clinical areas to implementing new Enterprise Agreements.

And, of course, I use the Framework for any projects I run in Bendigo Health!

Pastures new 2

Lorna Atkins was trained as a Facilitator at Weaver Vale Housing Trust and, like Elisa, has recently moved organisations. Lorna reflects on her time as a Facilitator and how she is starting to use the skills in her new role.

I joined Weaver Vale Housing Trust back in June 2007 straight from university. I initially joined as a Payroll/HR Administrator, closely followed by a secondment opportunity as HR Coordinator. During this time I studied towards my post graduate diploma and became CIPD qualified. In 2009, the opportunity arose to apply for the Facilitator role and I decided to go for it. There were many reasons to why the role appealed to me. Firstly it was something very much outside my comfort zone. Standing up in front of people was certainly not my strong point and something I knew I needed to improve on for my future career. I also saw it as an opportunity to add further variety to my main role. So through the recruitment and selection process I went and was fortunately successful in obtaining one of the positions.

I was contracted to work 52 days per year and this was to be worked around the need for facilitation support and also the business need within my main role. The year I undertook my training, it also coincided with me obtaining a promotion in my HR role. Balancing the two roles wasn't always easy and did present some difficulties for both me and my team. However, with flexibility and support from colleagues, these difficulties were far outweighed by the benefits the role brought. Not only did I get the improved confidence and the variety I had initially sought, but also a much greater increased knowledge of the wider business and also at a more strategic level. This greater understanding assisted when taking a more

business minded view of decisions within my role and I was able to share this with the team at times too. It also allowed me to get out into other areas of the business I wouldn't necessarily work with and the exposure to work with other areas and at all levels can only be of benefit. Getting into the mind set of a Facilitator, this assisted with how I worked in my main role day-to-day. It helped me to become a lot more focussed, much more process-driven and gave me the ability to prioritise and plan in a much more logical way. In terms of recompense for the teams support, we were able to use utilise my skills within the team and it helped us work through issues, situations and projects in a more effective way.

The kind of work we got involved in as Facilitators were Annual Planning for all teams across the Trust, project work, awaydays, effective meetings, policy work and Flowcharting amongst other things. One of the strengths of the Facilitator team I worked with was that we were always looking to continually improve the service we offered and were flexible in what we could help out with. This worked for both the Trust benefit but also for our own personal experience and development.

In September 2012, I took the difficult decision to leave Weaver Vale and took up a role at Bentley Motors Limited. Through the selection process they were particularly interested in the facilitation role and what exactly this involved. Working as a Facilitator does certainly give you an 'added edge' and allows you to demonstrate added value you could provide in addition to your main role. I was fortunate enough to be successful for the position and I began working for Bentley Motors Limited as a HR Officer in October 2012. I have already begun using some of the tools and techniques day-to-day in my role and have my first Facilitator job booked in with one of their experienced Facilitators. I'm looking forward to continuing to utilise my skills more, they may just take a bit of persuading on all the post-its!!

Overall, I would recommend the Facilitator role to anyone who would like to improve their skills and knowledge and get on in their career. It was a great opportunity for me and I'll always be grateful for that and the benefits I have got from it.

*Lorna Atkins
Bentley Motors Limited*

Systems Update

- Kestrel in Queensland
- Lessons in Performance Management
- Brisbane, July 2012
- Year 2 of Kestrel for Yarra Trams
- Improving performance at Docklands Light Railway
- Beyond satisfaction

Kestrel in Queensland



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- 01 GORDON BUCHANAN AND DANICA FANNIN WHO HAVE BEEN FANTASTIC TO WORK WITH THROUGHOUT BRISBANE FOR THE MAJORITY OF 2012 AND THIS WILL CONTINUE IN TO 2013. KANGAROO POINT IS A LOVELY PLACE BUT (A) THERE ARENT ANY KANGAROOS ANYMORE AND (B) IT CAN GET A BIT LONELY, SO IT'S ALWAYS A TREAT WHEN YOUR RELIEF ARRIVES. AZHAR AND KEV, NOVEMBER 2012.
- 02 WE HAVE HAD AT LEAST ONE UK-BASED SYSTEMS CONSULTANT ON THE GROUND IN BRISBANE FOR THE MAJORITY OF 2012 AND THIS WILL CONTINUE IN TO 2013. KANGAROO POINT IS A LOVELY PLACE BUT (A) THERE ARENT ANY KANGAROOS ANYMORE AND (B) IT CAN GET A BIT LONELY, SO IT'S ALWAYS A TREAT WHEN YOUR RELIEF ARRIVES. AZHAR AND KEV, NOVEMBER 2012.
- 03 MAYNE DEPOT IS WHERE QUEENSLAND RAIL'S TRAIN ON-TIME RUNNING (KESTREL) PROJECT FULL-TIME TEAM MEMBERS ARE BASED.
- 04 PAUL GLEESON AND BRAD SCOTT, QUEENSLAND RAIL
- 05 DOUBLE-DECKER IN BRISBANE

Lessons in Performance Management

One of our main objectives when we develop any software is not just to provide the software but to truly understand the topic and ensure that Best Practice is built in with the help of a variety of friends and clients. This has taken Madeleine to York, London and Sydney to mention just a few places. Thank you to the many people who have been so generous with their time and contributed to the development of Kestrel over the last few years.



ON THE PLATFORM AT YORK - JILL HANNAH, PERFORMANCE MANAGER FOR GRAND CENTRAL, EXPERT IN DELAY ATTRIBUTION AND ALL ROUND GOOD EGG, MAY 2012



Brisbane, July 2012

Year 2 of Kestrel for Yarra Trams

Yarra Trams in Melbourne have had Kestrel up and running since 2011. Kestrel is customised for the unique needs of each client and their system has evolved significantly over the last year. 2012 saw the appointment of a new Head of Performance. James Kennedy made the 20000 km move to Australia from the UK to start playing with trams as opposed to trains. Here is his perspective on the Melbourne network and Kestrel's role in it.

Yarra Trams engaged the UIC to assist in the development and delivery of one of its core operating performance management tools - the analytical database system that records all real-time operational delivery for our 1 600 000 scheduled tram and light rail services per annum. It was key to the largest light rail and tram network service in the world. With eight depots, 1200 drivers, and 500 trams across nine maintenance sites, our requirement for good data is key. Additionally our franchise incentive schemes and bid obligations depended on us getting this right.

Like many transport organisations the existing analytical solutions were in-house databases developed over a long period of time. These provided a level of support for the business in making decisions but were difficult to support and maintain whilst also not providing a full level of required support to all levels of the business. The UIC have been hugely supportive in delivering the new system which is live and running. They work closely with us as we specify our requirements and are providing flexibility as our needs change and grow. Also we are now developing increased user interfaces as the system is integrated into the whole business and we gain essential feedback from the internal customer.

The new system has improved our ability to deliver improved business case analysis,

challenge delays incurred, quantify benefits through the performance incentive scheme, offer quality data to the State Government and generally increase our knowledge of real time running as it relates to business commitments.

*James Kennedy
Head of Performance
Yarra Trams*



Improving performance at Docklands Light Railway

Kestrel is a Performance Management System which enables us to understand our delays and do something with the information that will help us improve performance.

The work was scoped very carefully to make sure all our needs were understood and then prioritised. This happened very quickly with scoping finished by 6 July 2009 and a working version 1 of Kestrel was installed on 2 September 2009. Version 2 was installed in June 2010 which dealt with the redesign of the system to include the management of Delay Attribution.

Work on Version 3 is currently ongoing and will put performance management in to the hands of those who are in a position to do something about it - our managers. This has been delayed internally while we sort out everything that we and our client, DLR Ltd, wish to include.

We now have automated production of reports cutting down on management time taken to produce performance information. We are constantly seeking ways of improving information management and have developed a number of bespoke charts and graphs with the willing assistance of the UIC. Serco Docklands enjoyed an enormously successful Olympics and

Paralympics Games and the assistance provided by reliable systems and support cannot be overstated.

*David West
Performance and Concessionaire Manager
Serco Docklands*



Beyond satisfaction

City South Manchester Housing Trust continues to make great use of Noriaki. Phil Lukes, Customer Involvement Manager, takes us through how the use of the system has grown.

We're now into our third year of using Noriaki and we have a whole programme of customer satisfaction surveys which we have timetabled throughout the year. The core is a suite of ongoing surveys on repairs and maintenance, home improvements, anti-social behaviour services and post-let satisfaction. All these are telephone surveys (in the main) conducted by our customer services team via a work tray set up for the purpose, into which we periodically load up contact information for people who've received those services.

In addition we have other services about which we test satisfaction quarterly, twice or once per year, including caretaking services, leaseholder services, neighbourhood satisfaction, gas safety servicing and income recovery services. Some of these are paper based and we have also started sending some surveys out by e-mail to try and increase response rates.

In addition to satisfaction, we also conduct consultation surveys as and when required, so we're getting good use of the system.

One other use I've put Noriaki to is as a Tenant Involvement Tracker. I've set up a questionnaire

about involvement activity that I ask lead officers to complete after involvement events. The main purpose of this is to collect information about involvement work in one place and work it up into reports, mainly via a tabular export, but it does give us the ability to do some statistical reporting too of course.

*Phil Lukes
Customer Involvement
Manager
City South Manchester
Housing Trust*

Phil also forwarded his response to an enquiry he saw on a best practice sharing website. Thanks for the recommendation!

Subject: Electronic Surveys

We're currently reviewing the way we survey our customers and, as part of the review, I've been tasked with seeing what other organisations are doing with regard to electronic survey techniques you may have used.

Could anyone share any links to their own surveys that you may have hosted via your website or elsewhere in cyberspace?

That would be very much appreciated. I'll be happy to forward any responses to other interested parties on this list if there's interest.

Thanks for your time

Chris Plant



Phil's response

We use a system called Noriaki which we buy in. It's easy to use, has good reporting facilities and we get great support from the supplier who have developed the system to fit our needs and listened to our suggestions for improvements and responded. It gives you the option of on-line surveys where you can post the link on websites or send in e-mails. You can also do paper surveys and it also works on handheld devices so we can incorporate it into our mobile working. We originally used it for our Staff Survey but now use it for all our Customer Satisfaction Surveys and for consultation surveys (see example below).

I've found an example of one of our own on-line consultation surveys that you can click on and see how the survey looks. It's no longer in use so you can even try answering the questions, although this example is quite long. We normally try to keep them short and sweet.

Hope this is useful

Phil



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