

# Yearbook 2014



## 2014 Points

Leaders speaking

Three of us in this marriage

Interpretation at a glance

50 years of **Managerial Breakthrough**

Is the UIC haunted?



The Universal  
Improvement  
Company



The Universal Improvement Company



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# Introduction

## 2014 Points

Those of you who got it straight away, good work. Those of you who are wondering what I'm on about, please see me after class.

The great quality guru - Dr W. Edwards Deming - died over 20 years ago in December 1993. His work changed the way businesses run and, even after 20 years, his principles are a challenge to many if not all managers (me included). It is hard to pick out individual elements of Deming's work to talk about as it is a system and therefore all the elements are interdependent. Deming's best known book is *Out of the Crisis*, first published in 1982. Chapter 2 is entitled 'Principles for Transformation of Western Management' and here Deming articulates his '14 Points' or 'obligations for managers' as he sometimes described them. In 2014, 20 years after his death, it is worth exploring whether or not the 14 Points are still valid.

Deming starts most chapters of *Out of the Crisis* with an 'aim of the chapter' or similar. Chapter 2 starts with 'Aim and Preamble'. This includes: "The purpose of this chapter...is to explain the elements of the transformation which must take place....This chapter also provides criteria by which anyone in the company may measure the performance of management. Everyone in the company will now have a basis by which to answer the question: How is our management doing?"

Further into the chapter Deming touches on the role of top management in improvement. This was a key theme recurring throughout his lectures and writing. "Support of top management is not sufficient. It is not enough that top management commit themselves for life to quality and productivity. They must know what it is that they are committed to - that is, what they must do. These obligations can not be delegated. Support is not enough: action is required."

It might surprise you to hear me say that the UIC has very little effect in some of the organisations with which we work. Indeed, in some, there are no measurable improvements whatsoever at an organisational level. Before you start to cancel your orders though, there are other organisations we work with that achieve remarkable results. The reason? The commitment of and leadership provided by the boss. Even better results can be obtained if the Chief Executive/Managing Director and other Directors work collectively as a Corporate Brain rather than a group of extremely talented individuals. To do this requires time and effort but the results can be staggering. Conclusion? Deming's preamble and introduction, along with every one of the 14 Points, are just as valid today as when he first wrote them.

*Richard Capper*  
richard@theuic.com



So, back to *Out of the Crisis* and the 14 Points. On the back cover, Deming kindly provides us with a summary of the 14 Points reproduced here:

- 1 Create constancy of purpose for improvement of product and service
- 2 Adopt the new philosophy
- 3 Cease dependence on inspection to achieve quality
- 4 End the practice of awarding business on the basis of price tag alone. Instead, minimise total cost by working with a single supplier.
- 5 Improve constantly and forever every process for planning, production and service
- 6 Institute training on the job
- 7 Adopt and institute leadership
- 8 Drive out fear
- 9 Break down barriers between staff areas
- 10 Eliminate slogans, exhortations, and targets for the work force
- 11 Eliminate numerical quotas for the work force and numerical goals for management
- 12 Remove barriers that rob people of pride of workmanship. Eliminate the annual rating or merit system.
- 13 Institute a vigorous program of education and self improvement for everyone
- 14 Put everybody in the company to work to accomplish the transformation

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# accuteque - Yarra Trams, an alphabetical compendium\*

This section is a client-by-client collection, seeing the welcome return of some of our regular contributors plus a smattering of first timers. No year is ever the same and in 2013 our clients faced the usual variety of challenges from a new Chief Executive (what will they think of UIMPROVE?) to a complete change of strategy. One thing is certain - there's never a shortage of challenges and this means there's always a lot to learn.

- **accuteque**
- **Birmingham Community Healthcare NHS Trust**
- **Broadland Housing Group**
- **City South Manchester Housing Trust**
- **European Marketing Confederation**
- **Eversheds**
- **First Great Western**
- **First ScotRail**
- **FutureBrand**
- **Great Yarmouth Community Trust**
- **Haven**
- **Liverpool Housing Trust**
- **Northern Rail**
- **Pure Innovations Limited**
- **The Regenda Group**
- **Serco Docklands**
- **South Yorkshire Housing Association**
- **TransLink**
- **UITP ANZ**
- **Weaver Vale Housing Trust**
- **Yarra Trams**

\*A compendium (plural: compendia) is a concise, yet comprehensive compilation of a body of knowledge. In most cases the body of knowledge will concern some delimited field of human interest or endeavour.



accuteque is a wholly owned, Australian management advisory company specialising in project management, business process optimisation, strategy, facilitation, quality assurance, governance and testing. We combine industry best practice in methodologies, tools and people to deliver tailored solutions and equip our clients with a competitive edge, and to put it simply, make their business better.

Creating collaborative spaces is at the centre of the accuteque ethos and the UIMPROVE tools facilitate this in a way that delivers the desired outcomes at the same time as creating a framework for future work to be conducted within.

Stepping in as new CEO, you often find that the baby is thrown out with the bathwater. However, the mandate that I wanted to deliver on was to identify those things that support and engage our people, and generate momentum towards our business goals through the refinement of these. Having worked in other capacities within accuteque, both as a consultant and management executive, and like many accuteque employees, I had undertaken the Universal Improvement Skills course and understood the practical applications of this training within our business. Universal Improvement Skills had been integrated into our learning and development program 2 years earlier, with a view to creating a shared language among employees from a range of disciplines. This means that all accuteque employees and many of our contractors attend this course as part of their induction into accuteque, and as we continue to grow the business in Sydney and Brisbane, we will also ensure that our people there will be equipped with these skills. Not just so they can engage with our clients in a much-improved way, but so they too share in accuteque's common language.

# accuteque

## Part of our DNA

**In April 2013, accuteque welcomed Natasha Norton into the role of CEO. With a background in Program QA Management and project management, Natasha has worked with various project methodologies throughout her career, but believes that UIMPROVE provides something that fits accuteque's own unique approach to engaging with its people and its clients.**

But more than just being course attendees, UIMPROVE is now embedded in the day-to-day operations of our business. Internally it is used for everything from Project Kick-Starts, to Brainstorming our company values, to running Team Meetings, to diary management. It's not something we pull out of our toolkit to use with clients once a year for a major transformation project, it's practical, highly collaborative and used every day. I have two strategy steering grids stuck on the walls of my office as a visual reminder of what is left to do, and these are actively referred to by our Strategy Steering Committee. My Executive Personal Assistant, Louise, uses mini post-it notes to prioritise her task list on a daily basis. And it works because she just won PA of the Year! We have even created new collaboration spaces where we can do this work. One of the meeting rooms in the office, which we have lovingly named 'the fishbowl' is a hub of activity, flipcharts, Ishikawa Diagrams and post-it notes.

2014 will be the fourth year we have engaged the UIC to facilitate our strategy development which provides a wonderful sense of continuity for our company. The UIC arrive with an understanding of where we have come from and where we want to go which is critically important as we look to put our 5 year business plan together.

We are an organisation who practices its own improvement methodology; what we take to our clients, we use on ourselves. Being proponents of UIMPROVE is where we see the most value, whether we are conducting health checks, building a model office, developing a strategy or facilitating a workshop, we utilise improvement skills, tools and techniques right across our service offering. It allows us to provide a unique service offering in the way we engage their people, from the coalface to executive management level, particularly in requirements gathering where the importance of hearing all opinions is paramount.

You know you've got the right methodologies and processes in place when it's not referred to by name anymore, but that the practice is simply that, the way we practice our day-to-day work and project management. It's part of our DNA.

*Natasha Norton*  
*Managing Director*  
*accuteque*

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 01 CAROLINE PATTON, LOUISE BROWN AND NATASHA NORTON BOARD EVENT, JANUARY 2013  
 02  
 03 STRATEGY DEVELOPMENT EVENT, FEBRUARY 2013  
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# Birmingham Community Healthcare NHS Trust

## Enlightenments on leadership



LOUISE OLDNALL

Louise Oldnall attended one of our public Universal Leadership Skills courses and, having left enthused, we asked her to write us a brief piece for the Yearbook.

I am well versed in 'leading' service improvement 'project-by-project and in no other way' due to the fantastic teaching and guidance from the UIC and the support and facilitation I receive from my fabulous Facilitators within Birmingham Community Healthcare NHS Trust.

My latest enlightenment is that 'people are led individual-by-individual and in no other way' following attendance at the Universal Leadership Skills training. Having sat through many lectures in the past relating to leadership and acquiring a qualification or two along the way, I have had the opportunity to reflect on my practice and understand how I have been applying the theory to practice due to the guidance of Denise and Sarah.

The course met all my expectations and needs as I entered the training wanting to learn more about how to create and share a vision for the future of the services I lead. On reflection, I concluded that leadership is the key to creating, sharing and achieving a vision.

There are a number of significant learning points for me as a result of attending this course which enable me to be a better leader:

- > *Leadership is my responsibility even if I haven't always received good leadership myself*
- > *The leadership behaviours of those I lead is my responsibility*
- > *I can learn lots and lots about leadership from those around me, past and present, good and bad. I simply need to decide which ones I intend to emulate.*
- > *I cannot motivate people but I can reduce dissatisfiers and increase satisfiers so as to trigger the internal motivation of those I lead*
- > *I am Theory Y but certain personalities can push me into being Theory X*
- > *People are led individual-by-individual and in no other way*

There is so much more I learned and if you are interested in my brief reflections above I would recommend you attend the training for yourself.

Louise Oldnall  
Interim Head of Speech and Language  
Birmingham Community Healthcare NHS Trust

## How we do things around here

Julia Brinsdon was a speaker at the 2013 Facilitators Conference. We asked her to reflect on the journey that the Trust has been on since training their Facilitators.

When I was invited to write something for the Yearbook, I found myself reflecting on the way that successful users of UIMPROVE have embedded the methodology into the infrastructure of their organisations and the common messages I heard from other speakers at the Facilitators Conference:

- > *Of course there's an Annual Plan*
- > *Naturally we have a pool of Facilitators*
- > *It is taken as read that you need a process for booking Facilitators*
- > *Everyone knows there will be a Round Robin and a Cocktail Party*
- > *Putting Structure to a Topic just describes our modus operandi*

In my own organisation, despite the enthusiasm of a core group of Facilitators and some of our managers who were convinced, we felt as though there was an awful long way to go before things looked anything like that around here. The experience of being facilitated without UIMPROVE and ending a long, hard day without a plan helped to persuade some more people who needed convincing that there was something in the post-it note way after all.

The support of other Facilitators at the Conference in May renewed our enthusiasm and spurred us on. And slowly, but surely (one project at a time?) the tools and techniques have found their way into the day-to-day work of the Learning Disabilities Service in Birmingham Community Healthcare NHS Trust.

Now we come to reflect on 2013 we see that our organisation really has adopted UIMPROVE:

- > *All our projects have plans, Champions and Project Leaders*
- > *They have been kick-started and continue to be facilitated*
- > *New Facilitators have come on board*
- > *Even people who have never been on training know how to cluster and what TPN and Now-Soon-Later mean*
- > *Flowcharts have appeared that describe our systems and processes*

There is still a lot of work to be done and things are not always as good as they might be but we are certainly getting there!

Julia Brinsdon  
Speech and Language Therapist  
Learning Disabilities Service  
Birmingham Community Healthcare  
NHS Trust

You can see a video of Julia speaking at the conference on-line: [www.theuic.com/FacConf7](http://www.theuic.com/FacConf7)



JULIA BRINSDON



# Broadland Housing Group

## The view from Broadland

In my article last year I wrote about coping with Austerity Britain - that the reality was that the world had changed for social enterprises and housing associations and we had to get used to it. The new normal was going to bear little resemblance to old status quo before both the global financial crisis and the 2010 General Election. It would be easy to write a similar article this year, as much of 2013 at Broadland has been to ensure that we can not only cope with the substantial structural changes that have happened, but that we still deliver on our mission and vision statements. Broadland, as a group, exists to improve lives for people in our patch through our portfolio of 5000 homes; through building new homes; and through effective support services.

It would be stupid to suggest that this has been an easy journey for us. Last year I talked about the huge investment in time and resources involved in working out how to respond to the government's changes in welfare provision and much more limited funds for new homes. Last November our ten project groups reported back to the Board and we adopted almost 70 recommendations for change. A year on nearly all of these changes have been made, which is tremendous.

A German friend of mine, speaking at an event I was chairing in Amsterdam recently invented his own German Proverb, which I think is excellent and worth thinking about. He said: "Vision without action is a dream; whilst action without vision is a nightmare."

I believe that by using UIMPROVE techniques properly and by fully involving

many staff in helping us plan the changes we needed to make, we managed to deliver actions based on clarity of vision. Given the momentous changes in our working environment it would have been easy to charge in and start changing things without thinking it all through properly. The joint board and staff project teams that planned our changes were given the time and space to carefully consider what needed to be done. They were not rushed, but equally they worked to a reasonable deadline. In parallel the Executive Team, all of whom participated in the project teams, were able to carefully review the organisational staffing structure that would be needed to deliver the recommendations, if approved. Time spent planning is very rarely wasted.

We did have to face up to some very difficult decisions. The Group had to reshape our staffing structure and also deliver a number of savings in order to remain viable. As a result we had to undertake a programme of redundancies. This was far from easy and everyone found it painful. I particularly hated it, but at least knew that I could fully explain the reason behind each decision to those of my colleagues who were losing their jobs.

Despite this difficult environment, we were surprised to find ourselves back in the Sunday Times Top 100 Not for Profit and Public Sector Employers. We very much use the Best Companies Survey primarily as our Staff Survey, as we like its impartiality and confidentiality. Interestingly our baseline score has not changed much over the 4 years we have participated, but we were encouraged to see that we were maintaining that level despite the changes going on around us. I have to confess that we did

not celebrate our re-emergence in the Top 100, as the news came in the middle of the redundancy programme. Instead we have used the detailed feedback - shared with the staff team - to help us consider how we can meet areas of concern. Best Companies is not a competition - it is a judgement on how engaged your staff are with your own organisation.

Outside of Broadland, I continue to find UIMPROVE techniques of extraordinary value. During the first part of the year I chaired an Independent Housing Commission set up by the Royal Institution of Chartered Surveyors (RICS). In the scoping stages of the Commission you would have found the high profile commissioners getting carried away with post-it notes and flipcharts. These tools proved excellent in prioritising the areas for examination, as well as resolving our conclusions at the end of the exercise. If you are interested in our conclusions, please do an on-line search for the 'RICS Housing Commission'. It is encouraging how some of our findings are already being acted on.

Lastly I would just mention some feedback we have recently received from our Investors in People assessor. He had expected to find cynicism amongst the team here at Broadland about UIMPROVE and particularly about the techniques and approaches we have adopted. Instead his feedback to our HR team was that he found the approach appreciated and totally embedded. After 4 years, UIMPROVE has really become the way we do things round here.

*Michael Newey  
Group Chief Executive  
Broadland Housing Group*



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01/02 EXECUTIVE EVENT, MAY 2013





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# City South Manchester Housing Trust



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- 01 LEADERSHIP FORUM, FEBRUARY 2013
- 02 EXECUTIVE EVENT, NOVEMBER 2013
- 03 UNIVERSAL DATA SKILLS, SEPTEMBER 2013
- WORKER OF THE WEEK - AN UNPRECEDENTED TWO CONSECUTIVE WEEKS - LIZ JENKINSON
- 04 EXECUTIVE EVENT, JANUARY 2013
- 05 UNIVERSAL DATA SKILLS, SEPTEMBER 2013
- 06 UNIVERSAL IMPROVEMENT SKILLS, JULY 2013
- 07 DENISE AND DAVE POWER



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# The importance of Annual Staff Surveys

City South Manchester Housing Trust has been carrying out an Annual Staff Survey since the organisation was created in 2008. This enables any issues to be identified and trends to be tracked. Lisa Manzano, HR Manager explains why this is worthwhile.

We recognise that people's views are important and carrying out a Staff Survey every year gives employees the opportunity to have their say and creates a sense of feeling valued. It helps us measure the cultural shift and year-on-year progress that we have made. We can celebrate success from the positive feedback and it helps us to focus on areas for improvement.

The results from the 2012 survey told us that we needed to work on employee engagement and this became our focus for 2013. We have carried out a number of activities on this including Team Events and we have been able to link the outcomes to our Investment in People Strategy and people offer. This has driven a number of further improvements that have resulted in the achievement of Investors in People Silver Status with Health and Wellbeing, The Matrix and the inaugural Greater Manchester Chamber Apprentice of the Year Award.

The work on employee engagement has also resulted in reviews of a number of current practices that we have now improved upon, including recruitment and selection, probation, induction, learning and development and further education. The feedback from our people is that they can see a real transformation and that CSM is a great place to work.

*Lisa Manzano*  
HR Manager  
City South Manchester Housing Trust

LISA AND THE 2012 STAFF SURVEY



The 2013 Staff Survey was being finalised as the Yearbook went to press. Overall, it's been another year of improvement as you can see.

I feel involved in what is going on at CSM	+20%
CSM has a clear Vision and Corporate Plan	+19%
I understand CSM's goals and objectives	+19%
Communication is good within CSM	+16%
The whole organisation works together as one team	+16%
I have been involved in improvement activities at CSM	+13%
CSM is environmentally aware and responsible	+12%
My job is secure	+12%
My conditions of employment are good	+11%
We have improved our service to tenants over the last year	+10%
I am (not) stressed about the future	+9%
My pay and benefits are good	+9%
I am proud to say I work at CSM	+8%
I am excited about the future	+8%
I feel well supported at work	+8%
Managers are open with staff at CSM	+8%
I have regular 1-1s with my manager	+6%
My views are listened to	+6%
I am kept informed of what is going on at CSM	+6%
We have clear measures in place that tell us how we're doing	+6%
We work well together as a team	+5%
My work environment is good	+4%
My manager provides me with good leadership	+4%
I am clear about what is expected of me at work	+4%
We have clearly defined roles and responsibilities	+3%
I am (not) looking for a job outside CSM	+3%
CSM embraces the diversity of the neighbourhoods it serves	+3%
I believe that CSM's work is valuable and important	+3%
We have regular team meetings	+2%
I have a good working relationship with my colleagues	+2%
My manager always has time for me	+2%
CSM plays a vital role in the community	+1%
I understand what my colleagues do	-1%
The customer comes first in everything that CSM does	-1%
I am not really interested in CSM, it's just a job (disagree)	-2%
I have had the training I need to be able to do my job	-2%
I have the authority I need to be able to do my job	-3%

# Taking Noriaki to the streets

Phil Lukes is a 'founding user' of Noriaki, the UIC's survey software. Phil was a pioneer of using mobile devices to carry out surveys using Noriaki before iPads had been invented. Now that technology has caught up with Phil, in this article, he talks about how he can quickly and easily survey customers using Noriaki on an iPad.

In the summer of 2013, the Neighbourhood Services Team were given iPads as part of a roll out of hand-held working solutions so that we could work more efficiently and connect with our systems whilst out and about in our neighbourhoods. We initially tested this by putting a link to a satisfaction survey for new tenants which our Neighbourhood Officers had been doing on paper when they visited them a month or so after their tenancy started.

Using paper surveys had two drawbacks:

- (1) You had to spend time inputting it when you got back
- (2) The officer 'conducted' the survey which probably affected the honesty of the answers to a certain extent

Now the tenants are handed the device and complete the survey themselves. Since then we've used them at neighbourhood events, conducting consultation surveys about neighbourhoods, environmental issues and cultural awareness.

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

Organisations that are serious about improvement ask their customers what they think. There is a common pitfall for enthusiasts - surveys can be carried out without coordination meaning multiple, disconnected surveys and lots of different spreadsheets and databases. Noriaki is the UIC's survey system. Noriaki's aim is to publish and analyse all customer satisfaction surveys in an organisation using the same system bringing consistency to the layout, question and answer styles and creating a single repository of results accessible by everyone. Questionnaires can be published on-line, to a hand-held device such as an iPad or to paper. Noriaki can also be used for a number of other purposes such as Staff Surveys, customer profiling and internal audits. One of the key features of the system which differentiates it from other products is its analytical tools, in particular the straightforward creation of easy-to-interpret graphs.

# European Marketing Confederation

SCOPING SESSION IN BRUSSELS, 16  
NOVEMBER 2013 ANDREW AT THE  
BACK ON THE RIGHT

## Strategy Building for the European Marketing Confederation

On a glorious June day, surrounded by a city celebrating a royal wedding, I sat in a meeting room in a Stockholm hotel. Meeting there were the board members of the European Marketing Confederation (EMC); the final item on their agenda was election of a new Chair.

In the blink of an eye, it happened. I was that new Chair.

On the flight back to Newcastle, via Amsterdam, the following day I pondered the challenges that faced me.

EMC is a confederation of marketing professional bodies from across Europe. All membership bodies have found that the economic climate has impacted on their membership; EMC has been no exception to that trend.

So, all my marketing instincts told me, we couldn't keep doing what we had before and that the time was right to engage with our 'customers' about how EMC could add value to their organisations. We needed to go back to the very basics of our strategy and not be afraid to challenge every element of what we did.

Having worked with members of the UIC team in the past, I knew that they would be the people to help. A short and focused session (i.e. coffee and an agenda) with Andrea really helped me focus on what we needed to do. Andrea's summary of my long-winded briefing became a key part of the proposal I put to our next Board Meeting, in Brussels in September.

My pitch to my colleagues was clear. If we carried on as we were, we'd cease to exist sometime in the next 3 years. If that were the likely outcome then we'd be better off managing that decline and closure.

Of course, I didn't believe in my heart that there wasn't a role for a pan-European grouping of marketing professional bodies. The challenge was to work out, after over 30 years of history, what that role might be. What might we have to stop doing and what was missing from what we did?

Thankfully, the Board supported my proposal and the UIC team started work on the scoping phase of our strategy development plan the next week. We had identified that it was important to get the views of three key groups - existing members (after all, they were paying the bills), lapsed members (who must have seen value at some time) and organisations who had never been members (why was that and what did they know about us?).

EMC has a very small staff (that's a euphemism for one person), so she was able to work closely with the UIC team; something that has helped develop her skills.

Just 5 weeks after the project start, we were back in Brussels with the UIC team feeding back what they had found. The clear themes and concerns in the research phase mean that we can be very clear about our new strategic approach and, as I type this at the end of November, work is underway with four Board members each leading one of our new strategic themes.

It's still early days, but we have made a great start to developing our new strategies - built not on the whim of a new Chair or of Board members, but on real feedback from those who need our services and support. We are marketers, after all, so listening to that market should be at the heart of what we do.

*Andrew Harvey*  
*Chair at the Chartered Institute of Marketing*  
*Chair at the European Marketing Confederation*



# Eversheds

## Realigning the Marketing and Business Development Team

**Eversheds is one of the world's largest corporate law firms. Gareth Pezzack recently called on our help.**

In spring 2013, we concluded the realignment of our Marketing and Business Development Team to focus on supporting the firm's client strategy. We wanted to bring together our new group of senior managers to forge stronger working relationships and identify how the group could assist with strategy implementation. Having attended the UIC's Universal Improvement Skills course some years previously and experienced the UIC's expertise in facilitating Team Events, I invited them to help us. Working to quite a tight timescale, Andrea worked hard to understand the background, our challenges and our desired outputs, and then designed a bespoke 2 day event that met our needs perfectly.

The event was a great success - it really helped bring our team together and produced some tangible outputs in the form of a number of well-defined projects. Whilst exercises such as personality matching and raft building have their place, the UIC approach of bonding people together over Real Work is tried-and-tested. It is more enjoyable and rewarding for the people involved and is seen as value-adding by the firm's leadership.

*Gareth Pezzack  
Head of Marketing  
Eversheds*



# First Great Western



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- 01 UNIVERSAL IMPROVEMENT SKILLS, OCTOBER 2013  
02 UNIVERSAL IMPROVEMENT SKILLS, FEBRUARY 2013

# First ScotRail

## Magpie magic

First ScotRail uses the UIC's Magpie software to monitor and improve train formations. They have used the system to get to grips with short-formed services and, as a result, have been able to reduce the penalty charges levied on them as a business. Michael McKnight, ScotRail's Network Rail Delivery Manager, explains.

One of the performance measurements mandated by Transport Scotland is that we should provide a defined number of seats on each of the 2200 services we run each day. If we cannot provide the appropriate rolling stock, then there is a financial penalty incurred based on such factors as time of day and frequency of service. This is invoiced to us every 4 weeks for our review and where required we can dispute the findings of our regulator.

Initially it was thought that there was no readily available application that could help us with this issue and that this task would have to be done using spreadsheets and manual updates from the general railway service monitoring system. This was extremely slow as we had to manually check what trains were reported as being allocated to several hundred services daily, then a further check to confirm that this matched what was supposed to be there. This process was very inefficient and also somewhat inaccurate.

In 2008 the UIC introduced us to Magpie which would do all of this automatically and more besides.



We can now do this daily report in less than an hour. The results we get are considerably more precise and we can input timetable changes for special events or other circumstances with ease. This was not possible using the previous model. Furthermore we can attribute the causes of these short formations allowing us to measure our various operational groups by assigning them realistic targets and measuring these accurately. Magpie also allows us to provide clearer reports to senior managers and other stakeholders. In addition we can respond quickly and with better detail to data requests from other ScotRail teams in particular to customer concerns.

The increased focus that using Magpie has allowed us to bring to bear has resulted in a reduction of short formations by nearly half in both the number of occurrences and in penalty charges.

This year the UIC has been working on an even better version of Magpie for us. We are currently waiting for our IT team to confirm that we can run this new version Magpie and are looking forward to using the new features that it contains.

*Michael McKnight*  
Network Rail Delivery Manager  
First ScotRail



kcaldy



# FutureBrand

## Driving efficiency to match business growth

FutureBrand is a global creative consultancy and its Asia Pacific President Sarah Reiter first experienced working with the UIC over 10 years ago when she attended both Universal Improvement Skills and Universal Leadership Skills. Since then she has continued to remember and use the tools and techniques in a variety of increasingly senior roles. In 2012, building a new team at FutureBrand, she decided that the time was right for her colleagues to fully understand the why, how and when she would bring out the post-its.

Our partnership with the UIC, beginning in 2012, helped us tighten and streamline processes for maximum efficiency in all aspects of our daily work. Combined with our collaborative way of working, the learnings that we took from our training with the UIC helped improve our client engagement, adding value to several steps in this process.

We found the tools and techniques taught by the UIC to be extremely effective, simple to understand and easy to deploy in our day-to-day operational work. One particularly valuable tool we have learned is the Cocktail Party. We have used this technique in our project scoping and Kick-Start sessions and have found it to be extremely helpful in eliciting hidden insights from a large group of people over a short period of time. It is especially effective in an Asian working environment where it breaks invisible walls and stimulates participation without concerns for hierarchy or differences of seniority.

Thanks to the UIC, we have witnessed how efficiency can be achieved through a more systematic approach to planning, organising and analysing. We have also learned how a variety



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of techniques can help extract the most creative results from everyone involved - from staff to client.

Overall, FutureBrand has visibly benefited from the UIC training. It has driven our work performance to a whole new level of efficiency, and allows us to continuously match the needs of our business growth.

*Sarah Reiter*  
President, Asia Pacific  
FutureBrand



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- 01 UNIVERSAL IMPROVEMENT SKILLS, MARCH 2013
  - 02 UNIVERSAL IMPROVEMENT SKILLS, MARCH 2013
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# Great Yarmouth Community Trust

## Data rules okay

Great Yarmouth Community Trust's Chief Executive Andrew Forrest attended Universal Data Skills in September 2012 along with his Directors and other key staff. Here he reflects on how a better use of data has improved his organisation's effectiveness and confidence.

Putting the learning from Universal Data Skills into practice through the year has made a huge difference to our organisational effectiveness and confidence.

Reports to the Board of Directors are now fully evidence-based, comparable with previous periods to show improvement (or not), easy to understand and able to be interrogated - providing greater scrutiny and accountability. In our main public sector contracts we now understand what is happening in more depth than the commissioners, and have been able to set performance measures with confidence knowing that we can monitor how we are doing - and put improvement projects in place if we slip.

Knowing exactly where we are, when to be concerned and, more importantly, when not to react has made managing across the organisation so much easier. This has been the biggest step change on our improvement journey so far - the bit that holds the rest together. As times continue to get tougher and the pace of improvement increases it gives us a competitive edge that will be key to our long term survival.

*Andrew Forrest  
Chief Executive  
Great Yarmouth  
Community Trust*



Andrew was the Keynote Speaker at the 2013 Facilitators Conference. You can see a video of him speaking on-line: [www.theuic.com/FacConf7](http://www.theuic.com/FacConf7)



01 UNIVERSAL IMPROVEMENT SKILLS, MARCH 2013  
02 CORPORATE ANNUAL PLANNING, MARCH 2013

# Haven

## A critical friend

Ken Marchingo is the longstanding CEO of Haven; Home, Safe. For 20 years Haven has been providing housing and homelessness services in Regional Victoria with Ken at the helm. This has meant an enduring relationship with his Board of Directors. The UIC has been working with Haven over the last 4 years and we are heading into our fourth Corporate Annual Planning cycle together. Ken reflects on the relationship with the UIC and the impact it is having at the highest levels of his organisation.

The UIC has come to mean more to us over the past year than just a project management and process improvement consultancy. They've become a critical friend. A critical friend who knows our business, knows our team, and observes impartially, objectively, but with great professional interest. This is of enormous benefit to any CEO and especially me. Our critical friend is not someone who is a technical expert in the business, we're all that already. But they are technical experts in the business of getting into your business and getting the right things done for the right reasons. They are smart, savvy and wise enough to have the personal and professional skills to do that through a simple but effective agreed process.



To have that critical friend who is external to the organisation is in itself a critical requirement. The objective set of eyes, the impartial view of process, the wry lifted eyebrow that is not beholden to the hierarchy and can prod and cleverly challenge the oft-repeated assertions of superior performance and question the validity of the proffered evidence. This is rare and incredibly valuable.

There is no great insight here, which is why external consultants exist and in fact thrive.

The real issue is that there are so many external consultants, so many models of execution, organisational modelling, and improvement that it is difficult to settle on one or find one that is in organisational terms 'universal'.



So, what has the UIC and our occasional ad-hoc adherence to the frameworks achieved this year for us?

Year-on-year we have developed a program so that now 20% of our workforce have been through the basic training and we see daily a conversation that distinguishes between projects and handle turning.

Monthly, as we gather in the open meeting room that is the 'corner office', we work through a Master Steering Grid of strategy and projects for the organisation, with a few Haven; Home, Safe aspects added to contextualise for us. Nothing surprising here I guess, the master grid supported by divisional grids further down line and so on. Just as an aside, I read with interest how one of our staff in last year's Yearbook had planned the family's activities for the year using the UIC processes, and I note from the postcards from Hawaii that many of the desired projects were clearly achieved (note to self, why didn't I get to Hawaii?).

So, working through the steering grids with my direct executive level reports helps keep us on track and speaking a common language of improvement, so the benefits of the now embedded UIC investments we have made in each other are apparent in language and function.

But one stand out this year, one takeaway which is of relevance to any Chief Executive I suspect, is apparent for us.

The UIC has worked with us for some years at a management and executive level, as we have inculcated this methodology into our organisation as one of our key practice anchors. But helping our Board to see the benefits of a facilitated strategy session had not been on the agenda until recently.

Frankly for all concerned - the UIC, Board and Executive - the first strategy setting session was, shall we say, 'like pulling teeth'.

Any Board of competent, committed directors who know the business, will naturally be led with some resistance to a new model of strategy setting, I suspect especially when there is no crisis to be solved, no compelling challenge to be overcome, and in an environment of year-on-year growth (regardless of how challenging and changing the external environment has been) for almost 20 years continuously, the critical need for a different process is hard to sell.

But perseverance is a key skill of Madeleine, Lisa and Jenny (our UIC Facilitators) and we all lined up for the second year.

A single outcome, captured in a single statement. A single sentence that is agreed, understood, and signed off now, not just in words, but practice.

A line in the sand that has in one day moved the Board and CEO relationship into clearer territory than ever before.

The Board's shared outcome of the strategy setting and review exercise was this - that the Board's role is defined by and stops at the 'S' in Strategy. The CEO's role starts at the 'S' in Strategy.

If I were a hipper, cooler, individual I might punch the air and make a middle-aged goose of myself. But really what this meant was we had a process that allowed for the Board to live the governance processes that they, and frankly myself, want them to subscribe to in practice. Every Board says something like the above, but so often the stated aim gets lost in the minutiae and suddenly Chief Executives are up to their necks in operational detail with the Board.

As we head toward the next strategy session, we have a Board that remains united in the view of monitoring and observing their desired outcomes of the agreed strategic directions, but with no desire to set, limit, or proscribe the actual strategies. This leaves us free to interpret their desired outcomes into a framework of activities, projects, or actions that get us there.

The UIC has made it possible for us to clearly link the governance model with the strategic desires and operationalise this at the right level for the Executive and the Board.

Nice work, friend. We look forward to more.

- 
- 01 BOARD STRATEGY EVENT, APRIL 2013
  - 02 KEN (SECOND FROM THE LEFT) AND TEAM WITH THEIR PROJECT STEERING GRID
- 

*haven*  
HOME. SAFE



CLAIRE WILDE AND  
STEPH HODGSON



# Liverpool Housing Trust

LHT has been enjoying reinvigorating its approach to the UIC methodology recently. In 2013 the Executive Team underwent the Strategic Improvement Programme and eight new Facilitators (who are already in great demand) are currently being trained. We have set up a Facilitator Network to support them and to share our facilitation experiences. We are looking forward to our managers undergoing the Universal Improvement Skills course in early 2014 and of course attending the conference in May.

*Claire Wilde*  
*Business Intelligence Manager*  
*Liverpool Housing Trust*



01



02



- 01 FACILITATOR DEVELOPMENT PROGRAMME, NOVEMBER 2013
- 02 STRATEGIC IMPROVEMENT PROGRAMME, OCTOBER 2013

# Northern Rail

## Taking Magpie to the next level

Alistair Rutter, Planning and Regimes Manager, talks about the recent improvements made to Magpie, the capacity management software supplied to Northern Rail by the UIC.

Over the past 6 months members of the Performance Team within Northern Rail have been working closely with the UIC to move Magpie from a capacity management tool to one that will be capable of delivering powerful information that allows us to truly understand the real impact disruption has on our passengers. By linking in passenger count information and measuring lateness of services, we will be able to improve the service we deliver by, for the first time, knowing how many passengers did not get the journey experience they expected, be that held for 15 minutes due to regulation, or where we provide a train with less than the planned

carrying capacity. Through this we will be able to target improvements that make the most difference to our passengers.

Improved dashboards allow us to see, on the day, the carrying capacity we have delivered into major hub locations that we serve - Leeds, Liverpool, Manchester (Piccadilly and Victoria), Newcastle and Sheffield. Improvements in the application mean a quicker, smoother product that can be accessed from various platforms such as tablet PCs, desktop or even mobile phones. An improved interface allows our Controllers to quickly and efficiently record reasons for non-delivery of the plan to help us understand the consequences and report back to industry bodies such as Passenger Transport Executives, the Department for Transport and our own internal Responsible Managers.

*Alistair Rutter*  
*Planning and Regimes Manager*  
*Northern Rail*



PRO WITH CHRIS CARPENTER, OF NORTHERN RAIL





- 
- 01 DOUG CRESSWELL, GROUP CHIEF EXECUTIVE (FRONT ROW, CENTRE) AND TEAM, EXECUTIVE EVENT, OCTOBER 2013
  - 02 UNIVERSAL LEADERSHIP SKILLS, APRIL 2013
  - 03 UNIVERSAL LEADERSHIP SKILLS, MAY 2013
- 



# Pure Innovations Limited

## Self-reflection and leadership

Pure Innovations supports people with a wide range of disabilities to help them make the most of what they can do. Dave Ferrier has always been an enthusiastic proponent of UIMPROVE. In 2012 he was promoted to the role of General Manager of Employment and below he talks about how attending Universal Leadership Skills has helped him to lead his team.

Since taking up the post of General Manager of Employment for Pure Innovations in January 2012, I along with my employment teams have been on the most incredible journey of change. Whether this be through the different contracts we are delivering, or simply adapting to the economic challenges of needing to deliver more for less while ensuring we continue to deliver the best possible quality of service to our clients.

Implementing this change has needed good quality leadership from me and my managers to make it happen, to implement fit-for-purpose systems and processes that ensure our teams are supported in delivering our service. So doing the UIC's Universal Leadership Skills training with most of my direct reports in April 2013 couldn't have come at a better time.

One of the best things about the training was actually doing it with my team. This gave an excellent platform for us all to learn, share our thoughts and

experiences at the same time. It also ensured we were all going to leave after the 3 days with the same message.

Some of the learnings that have served me well so far: Well, we needed to make sure we had the right systems and processes in place to start with, there needed to be a structure, people needed to know what the structure was, so improving our communication was key.

What, how and when we communicate has been key in the way we lead our teams, also ensuring we are communicating a constant message. I also think it is important to ensure everyone understands the difference between communication and consultation.

Also and perhaps the most important thing I walked away with was - keep it simple. Why do and say ten things when you can do it in three and still get the desired, if not even better, quality and a quicker outcome.

As with all the training I have done with the UIC, Universal Leadership Skills makes you think. It makes you ask questions of yourself and evaluate where you are - but most importantly, it gave us the tools to ensure we continue to deliver the best possible service to our clients.



*Dave Ferrier  
General Manager of  
Employment  
Pure Innovations*



# The Regenda Group

## Interim engagement

We have been working with The Regenda Group since July 2010 and in that short period they have embedded the approach across the whole business. Below, Tracey Wilson, Executive Director for Business Improvement, explains one of this year's biggest challenges.

Engaging with our new Interim Chief Executive, David Jepson, in the what, why and how's of UIMPROVE was my most important challenge for 2013. What took place though was easy; as it was evident from walking around the organisation that the way business is done at Regenda has UIMPROVE running through it. Trying to explain just "what is UIMPROVE all about?" can be quite difficult, until you see it, feel it, touch it and then you begin to realise that having a way of doing things that translates and cascades throughout the organisation how the strategic intent can be achieved is fantastic.

David carried out a staff tour around the organisation in October 2013, after having been with us for around 3 months, and one of the key things he shared with staff was how he was impressed by how well-embedded our ways of working were. Visibility of flipcharts, post-its and steering grids made it so easy to see just how well ingrained it is. When you then link this to how a strategic awayday with the Board works, he could truly see the impact it was having in making sense of, and achieving, our strategic aims and ambitions.



01

David moves on to pastures new in 2014, spreading the word of UIMPROVE from his time at Regenda and we look forward to the arrival of our new leader.

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



02

- 01 STRATEGY DEVELOPMENT EVENT, JULY 2013  
RICHARD, THANKS FOR THIS PHOTO WHICH IS GREAT AND ALSO FOR YOUR FACILITATION OF THE 2 DAYS. I REALLY FELT WE GOT THROUGH A LOT AND IT HELPED MY UNDERSTANDING OF THE ORGANISATION AND THE SENIOR TEAM DRAMATICALLY. YOU KEPT US ON TRACK WELL WHEN WE WERE TEMPTED OFF PISTE AND SOME OF YOUR COMMENTS ILLUMINATED ISSUES IN A VERY HELPFUL WAY. PLEASE PASS ON MY THANKS TO DENISE ALSO, WHO KEPT YOU IN CHECK ADMIRABLY! REGARDS, DAVID JEPSON, INTERIM CHIEF EXECUTIVE
- 02 UNIVERSAL IMPROVEMENT SKILLS, JULY 2013



LOUISE DOUGLAS

## Transforming internal communications the UIMPROVE way

Louise Douglas had just started her role as Head of Communications at The Regenda Group when she attended our Strategic Improvement Programme alongside a number of colleagues. Immediately after the course she started to apply the approach with her team - below she shares some insights as to how UIMPROVE links with her specialism.

“Tell me and I will forget, show me and I will remember, involve me and I will understand.”

That quote - attributed to Confucius some 2500 years ago - still resonates with communications professionals today when trying to develop internal communications and engagement in their organisations.

There is a whole host of data from around the globe to demonstrate the business benefits of good internal communications and engagement. For example, highly engaged employees:

- > Are more likely to act as ambassadors for their organisation - which directly impacts on customer satisfaction;
- > Are more motivated and productive;
- > Give discretionary effort;
- > Take less time off ill; and
- > Are more likely to stay with the organisation.

And all of this ultimately impacts on the bottom line; an engaged workforce also

ultimately saves businesses money, lots of it. Gallup - whose research into employee engagement has spanned the decades and involved more than 1 million people - managed to quantify it in monetary terms. Using a retail organisation with 20 000 employees, Gallup researchers found that 20% of employees were disengaged and 19% engaged. The disengaged group took an average of 6.13 days off sick every year with staff turnover costs of £23m, while the engaged group took an average of 2.9 days per year and had staff turnover cost of £15.58m. The research has been repeated and yielded statistically similar results.

There are plenty of other good resources out there to demonstrate the business case for developing an engaged workforce but in our age of austerity, where every penny counts, can you really afford not to engage? Agreeing in principle is one thing but delivering can be even more challenging. There are many tools and techniques for developing new channels for internal communications but the Holy Grail of engagement are those annual sessions when the Chief Executive tours the business, to present on future plans. All too often, he or she is met with a wall of silence and embarrassed glances around the room when it comes to the question and answer session at the end. Even members of the most engaged workforce are reluctant to ask a question and those individuals that do are rarely brave enough to ask something meaningful. Time after time CEOs are left with the impression that either their employees don't really have an interest in the strategic direction of the organisation or that their over-riding concern in the workplace is the cost of a cola from the drinks machine.

Enter stage left the UIC. When I joined Regenda a little over 2 years ago, all senior managers were sent on the Strategic Improvement Programme. I could immediately see the potential of using the tools and techniques. Later - on attending my first Kick-Start - I was equally impressed to see it in action. Even the quietest of team members is given an equal share of voice and often to great effect.

I wondered if this could be the way forward for our internal communications. One of

the biggest challenges I faced in the role was that successive ‘Chief Executive Tours’ had yielded little or no feedback from staff across the organisation; or that just one or two people would dominate these events with questions, leaving others feeling they had not been given the opportunity to express an opinion.

So in the autumn of 2011, I developed a new format and tied it in with our annual planning cycle. The ‘Tour’ would be an opportunity to share the Project Steering Grid for the year ahead. It would give colleagues the chance to constructively challenge, understanding more about Regenda’s strategic direction and how they could contribute to our overall success.

So using two of our team of Facilitators, we embarked on the first ‘Tour’. As always, it would start with a presentation from the Chief Executive but then the Facilitators would help the discussion along the way. Colleagues were placed on tables according to a seating plan - to ensure there was a good mix on each and that different people who wouldn’t normally meet were collaborating - and at the end of the presentation the Facilitators posed three questions:

- > Any surprises?
- > Any questions?
- > What can you do to contribute to the success of this plan?

Working in groups, each table submitted their feedback, with their responses written onto post-it notes, which were then stuck onto their respective flipcharts. Importantly, the Facilitators then gave the feedback to the room and Chief Executive, and also led on posing the questions. It gave people permission to constructively challenge.

Through open, honest and transparent answers from the Chief Executive, everyone gained a much deeper understanding of our direction and with that understanding came buy in; but more of that later. We repeated the process then with the Executive Team, who presented more detail on plans for their portfolios and then everyone worked in groups again.

At the end of the session, everyone was given the chance individually to write questions about anything else they wanted to ask and then posted them anonymously in a box. We were overwhelmed with the

volume of questions and, although we worked our way through some of them on the day, it was impossible to answer them all. We gave an undertaking that all would be responded to and the answers published on our intranet site within a month.

In all, on the first tour we carried out seven sessions in total and all went the same way. Our flipcharts were filled with feedback, we received some insightful questions from colleagues and there was a tangible buzz at each event. We had no baseline evaluation of previous work but decided to survey the staff at the end of the Tour and use their feedback to fine tune future events. The results were:

- > 98% said the Tour was either good or very good;
- > 82% said they felt they understood the impact their work has on the overall success of the Group; and
- > 97% said they felt everyone had an equal chance to make their views known or ask a question.

The ‘Tours’ have now become a regular feature on our annual calendar of events and we hold them twice a year; when the Corporate Project Steering Grids are produced and 6 months in, to review our progress. And we are continuing to build on their success - following our last series of ‘Tours’, 78% of colleagues told us they felt proud to work at Regenda as a result of their attendance at one of the events.

My team’s work and the wider evaluation we have carried out on this saw us receive a ‘Highly Commended’ in the Chartered Institute of Public Relations internal communications awards earlier this year for Team of the Year. We were up against a host of national and international brands, so to achieve that recognition demonstrates the impact we have made. Regenda also made it onto the Best Companies Top 100 list for the first time in 2013, in the Not-for-Profit category at 37th place.

We are on our journey to engagement - we will always be - but it feels like, with the tools and techniques the UIC has equipped us with, we may have actually found the Holy Grail.

*Louise Douglas  
Head of Communications  
The Regenda Group*





## Sign up to Wellbeing

This is a short summary of how we have used UIMPROVE to support our Sign up to Wellbeing campaign this year which has been run in partnership with other landlords.

We have continued on our path towards improvement this year using the UIMPROVE tools and techniques that the UIC has given us to expand and stretch our strategic ambitions at Regenda. During the past 12 months this has been evident across a number of projects, meetings and events which have all been run with the aim of improving our residents' wellbeing, and supporting a wider campaign across the sector which is about getting more housing associations to strategically 'Sign up to Wellbeing'. The interesting twist for us was engaging with staff from other housing associations, plus groups of our own vulnerable residents, who had not had the benefit of the UIC experience but still managed to effortlessly engage with those that had, in events such as Cocktail Parties (still with no alcohol!), Project Kick-Starts, Quick Clustering and Chronological Clustering. This range of project events led us quickly and effectively through group discussions which, had we not had the benefit of them, may have proved quite tricky to move through.

This all led to a range of activities being successfully delivered in a relatively short space of time including a 3 day Sign up to Wellbeing stand over the summer at the Chartered Institute of Housing Conference in Manchester, wellbeing discussions with my Supported Housing Team and residents at an Independent Living community and a training programme being rolled out for housing associations for staff and residents to positively respond to people living with dementia. I could elaborate much further as the pace at which projects can now be scoped, delivered and monitored has improved greatly meaning my team and the emerging Sign up to Wellbeing partnership are far more productive.

*Andy Carberry  
Head of Independent Living  
Regenda Limited*



## Three of us are in this marriage

**Steve and Jane Newsham both work for The Regenda Group and have just returned from a truly romantic holiday in Croatia and Montenegro where they came to the conclusion that there are three of them in their marriage, him, her and UIMPROVE!**

The holiday gave us time to unwind and recharge our batteries from busy work schedules but inevitably these two work enthusiasts and "improvement chasers" were unable to contain the pillow talk to non-work activities and we found ourselves straying into horizontal chit chat about Tribus, Pareto, Taguchi and Deming, none of which are anything to do with the names of the Dalmatian mountains but are in fact just a few of the names in our UIMPROVE manuals back at home. There was no escape from it and to our amazement the tour guide who took us to the top of the Njegui mountains was the absolute double of Denise from the UIC - and we thought that she was a one-off!! (Denise - this is true - you have a double who lives in Budva).

Our UIC training over the past few years has seeped so far into our psyches that not only has this made a great impact at work but we find ourselves using it at home, helping our son to scope out a summer music festival, carrying out a house refurbishment scheme and hosting Christmas Day.

Is this a marriage made in heaven or just a marriage made in a manual?  
Answers on a postcard please.

## Serco Docklands



KESTREL TRAINING, JUNE 2013



**serco**



01



05



# South Yorkshire Housing Association

- 01 UNIVERSAL DATA SKILLS, DECEMBER 2013
- 02 FACILITATOR NETWORK MEETING, DECEMBER 2013
- 03 FACILITATOR DEVELOPMENT PROGRAMME, JANUARY 2013
- 04 UNIVERSAL IMPROVEMENT SKILLS, OCTOBER 2013
- 05 THE EXPERIMENT ON THE RED BEADS - VICKY AND NATALIE MARSH, DECEMBER 2013



04

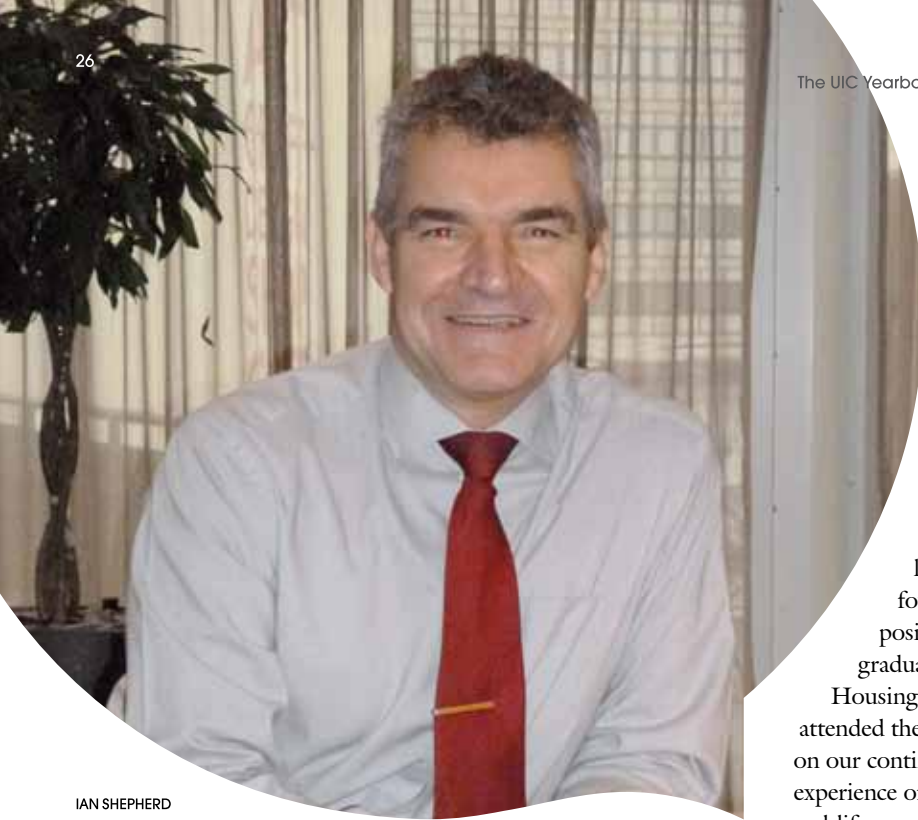


02



03





IAN SHEPHERD

## The right thing to do

**In autumn 2012 one of our longest-standing clients, South Yorkshire Housing Association, recruited seven graduates as part of a programme to provide career opportunities for young people. SYHA invited the UIC to run a course for the graduates as soon as they started so that they could hit the ground running with their projects. Here, Ian Shepherd talks about the results.**

It's been a year since South Yorkshire Housing Association welcomed seven graduates into the fold, a year since they attended Universal Improvement Skills and what a year it has been!

We wanted to recruit graduates as we felt that it was part of our contribution towards the youth unemployment crisis and a way to revitalise stalled projects with new skills that we didn't already have within the organisation. Since coming to work with us the graduates have worked extremely hard and we have seen some great results.

A follow up day in February was a great opportunity for the graduates to reflect on the first 4 months of their internships and how they had used their training to help them work on their projects more effectively. But it wasn't just a chance to reflect. We had to get them to do some work as well. We asked them to feed back to us on six different points including an overview of their project remit, how they've used UIMPROVE and a message for our Directors team. Without detailing every answer, which would take a long time and lots of paper, it was clear to see how much they had embraced the methodologies and just how positive they were towards UIMPROVE. The overarching messages to SYHA were: 'thank you', 'train more people' and 'embed UIMPROVE even more into the organisation'.

We gave them a chance to ask questions about some of the more complex tools to help them get the very best out of their manuals and whether they had worked with a Facilitator and what that experience was like. We took another look at the Ishikawa Diagram and found that working with Facilitators was an extremely positive experience. Later on in the year one of our graduates, James, proved this. Along with a team of our Housing Services Director and our Tendering Officer, he attended the UIC Facilitators Conference to give a presentation on our continued use of UIMPROVE. James talked about his experience of using a Facilitator throughout his project and gave real-life examples of how certain project pitfalls were neatly avoided by the UIMPROVE methodology.

GRADUATE EVENT,  
FEBRUARY 2013

It was also extremely worthwhile for us, having invested in them and the UIC training, to see the variety of responses that all pointed to the same conclusion. This was the right thing to do. Not just for our graduates, but for the rest of our people, the people we have trained as Facilitators and the people who attended the Universal Data Skills training. Are we glad we did it? Of course! All of the graduates produced fantastic results and were keen to get involved in projects and opportunities outside their initial remits. We are pleased to say that four of the graduates are also with us for a little while longer; either in their existing role or in a new one that continues them on their chosen career paths. We would like to wish all of the graduates the best for the future and we look forward to continuing our partnership with the UIC.

*Ian Shepherd*  
Performance and Central Services Manager  
South Yorkshire Housing Association

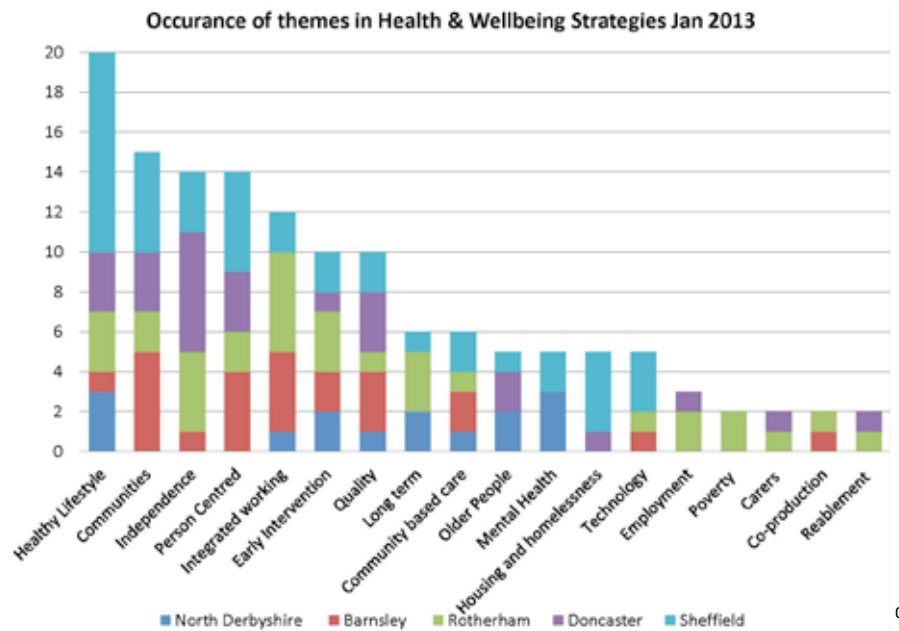
You can see a video of one of SYHA's graduates, James Highmore, speaking at the Facilitators Conference on-line: [www.theuic.com/FacConf7](http://www.theuic.com/FacConf7)

# Interpretation at a glance

Sarah Morton joined South Yorkshire Housing Association on the Graduate Employment Mentoring Programme. Since then Sarah was selected to be one of three finalists in the 2013 Chartered Institute of Housing annual search for the most promising Rising Star.

I joined SYHA in October 2012 as part of a scheme to bring new graduates into housing. After one day in the office we were whisked off to our Universal Improvement Skills training. And boy, am I glad we were.

Picture this - you are used to selling your product on a block contract to return customers. Then the environment changes. Your return customers disappear and are replaced with a new customer base, half of whom will not be buying in bulk but will be buying one-off services. That's exactly what happened to the LiveWell department at SYHA. LiveWell provide support for people to live independently in their home. In the past our services have been commissioned through Supporting People. In the future we hope to be working closer with the NHS and people who buy services themselves. To respond to these changes the team turned to their manuals - The Complete Guide to Improvement. The improvement giants, Shewhart, Deming and Juran, put data at the heart of decision making and organisational change. I was therefore commissioned to conduct research into our new commissioners and identify who they are and what their priorities are.



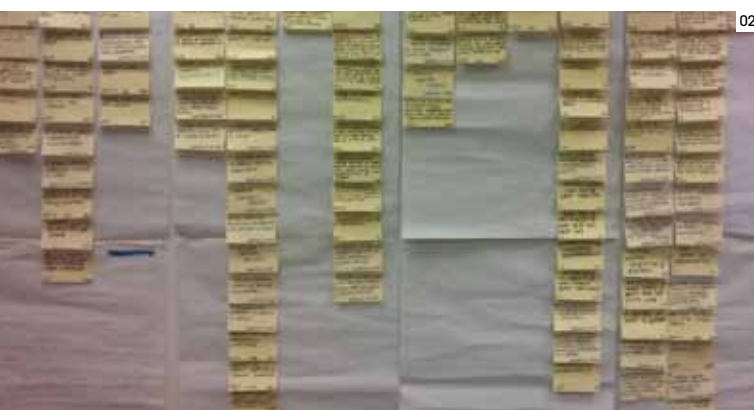
To complete the research I trawled through strategies, needs assessments, Board Meetings and other documents. As you can imagine, there was a lot of data to analyse and share. I turned to my manual and Facilitator Claire Matthews to guide my work. This helped me to plan and prioritise tasks as well as completing the tasks themselves. Health and wellbeing strategies inform all health commissioning decisions; therefore an understanding of these documents is essential. I used Clustering-by-Theme to identify priorities in the health and wellbeing strategies. This forced me to be concise as there's only so much that you can fit on a post-it note. One of the UIMPROVE data principles is that 'data should be displayed visually' as the human brain is much better at processing pictorial information. Therefore, to share this information effectively, I created a Pareto Chart, showing the themes and their occurrence in each locality. Senior managers can now see at a glance the overall priorities for the area we work in as well as the priorities for each locality.

The UIC training and manual made a huge task manageable and enhanced the communication and interpretation of the data. As we go through a dramatic period of change in the health and social care environment we are turning to our manuals to support our decision making more and more. As a recent graduate and newbie to housing, health and research, the tools have enabled me to successfully plan my work and communicate information that's effective and easily understood.

Thank you!

*Sarah Morton  
GEM Project Officer,  
Care and Supported Housing  
South Yorkshire Housing Association*

01 PARETO CHART  
02 CLUSTERING-BY-THEME  
03 SARAH MORTON AND JAMES HIGHMORE





## Engaging and improving

In September 2013 SYHA was awarded the Silver Standard Investors in People Award. We were thrilled with this news and, having reflected on the feedback from our Assessor, it is clear to us that the UIC and UIMPROVE methods of working have really helped us engage, develop and involve our people.

Below are some of the benefits our assessor identified:

- > Widely utilising UIMPROVE methodologies has helped SYHA realise tangible benefits such as process improvements
- > It is helping build relationships and confidence as well as capability and capacity and is fuelling greater engagement than would otherwise have been secured through the various strategies on their own
- > This more proactive approach, building on role model behaviour and UIMPROVE techniques is also seen as giving hope to internal departments impacted by changing processes and services
- > The UIMPROVE framework for project management is now engaging far more frequently with the right people and at the right time so that their views can be heard and taken into account
- > UIMPROVE methodology helps to empower people to make decisions and take action. An opportunity to be involved with colleagues in UIMPROVE project teams is something that SYHA staff really look forward to.

We think that UIMPROVE has made a significant impact on how we engage and develop our workforce as well as providing a robust project management model.

*Rebecca White*  
*HR Manager*  
*South Yorkshire Housing Association*

.....  
 THE SYHA HR DEPARTMENT, REBECCA FRONT ROW, SECOND FROM THE RIGHT  
 .....



01

## Finding the right partner

**Juliann Hall joined SYHA in 2013 and soon found herself attending Universal Improvement Skills with her colleague Miranda Plowden. On her return to the office, Juliann got on with applying the approach straight away.**

Here at SYHA we are very excited to have recently been selected by Sheffield Local Authority to lead on the Fulfilling Lives Ageing Better lottery programme for the city. The lead role is a significant one. We are required to consult with the whole of the voluntary sector in Sheffield in order to develop a vision and strategy for the city. The aim of the vision and strategy is to reduce isolation and loneliness for those over the age of 50.

Our first challenge has been to select a group of partners from across all sectors to work with us to develop the vision and strategy for the city. The lottery recommended we select eight partners. Our local authority had a list of almost 70 organisations that wanted to partner on this piece of work! Knowing that we had UIMPROVE manuals and Facilitators gave us the confidence to take a very collaborative approach to selecting the eight core partners. We decided to run three events and invite all 70 organisations and use the power of UIMPROVE to enable the group to come to consensus on who should be in the partnership, how the partnership should operate and how older people would drive the development of the vision and strategy. We had a short window of 4 weeks to run all three events.

We have a team of trained Facilitators at SYHA and their involvement was invaluable in planning and running the events. Our Facilitators worked with us to determine the desired outcomes of each event. They then supported our project team to develop an event programme which utilised a range of UIMPROVE tools. During planning our Facilitators kept bringing us back to the objectives, disciplined us on what was actually achievable in the timescales and always had an eye on true participation for all involved. This was not going to be death by PowerPoint. They brought a level of rigor to how the events were constructed to ensure we took participants on a journey that led to the critical decisions being agreed.



JULIANN HALL

At each of our events we hosted Chief Executives and Directors from a hugely diverse selection of organisations from across the city. The use of UIMPROVE disciplined us to focus on the key issues as a collective. The attendees split into groups and worked on a number of questions such as ‘what skills and experience would an ideal core partner have?’. The use of Round Robin enabled all organisations to have an equal say and the use of post-its and Clustering-by-Theme allowed us to easily identify the points of consensus rather than focus on the points of difference. Clear themes quickly emerged through the clustering which then led to decisions being rapidly agreed. The process also equipped us with lots of very valuable data to help shape the remit for the vision and strategy.

One of SYHA’s main objectives for the events was to demonstrate our capacity and ability to lead the Ageing Better programme for the city. We definitely achieved this aim and received excellent feedback from those organisations that attended.

The feedback we received included:

- > “The approach was very slick”
- > “A very different way to develop partnership working, loved it”
- > “I feel like I’ve worked at today’s event rather than be passive”
- > “The way you have approached this is very impressive”

We successfully appointed our eight core partners through our work in the events and will now work together to develop the vision and strategy over the next 5 months. Needless to say we will be using UIMPROVE to drive the vision and strategy development.

*Juliann Hall*  
*Director of Care, Health and Wellbeing*  
*South Yorkshire Housing Association*

# TransLink

## Boonah 1 - A new story begins for TransLink

The TransLink Leadership Team has come to realise, over a number of years, the value of regular time together away from the office to focus on organisational direction, our people and developing the Corporate Brain.

Our location of choice has always been Bribie Island, a small and sleepy beachside location about an hour from Brisbane, hand selected by our former Chief Executive, Peter Strachan. Over the years team members have come and gone, but the focus and format of our Bribie events has remained consistent and the event became part of our leadership story at TransLink.

Imagine the reaction when I boldly announced that TransLink would be embarking on a new leadership tradition, at a new location! The organisation has fundamentally changed, many of our leadership team hadn't been part of this 'history' and I felt it was time to start a new leadership journey together, with a focus on looking forward, rather than looking back.

The new story began in August when the team hesitantly made its way into the country. Boonah is a small farming community south west of Brisbane, known for high quality vegetables and also for the



fantastic views of the 'Scenic Rim' mountain ranges. For railway tragsics, Boonah was also the destination of Queensland's first branch railway, completed in 1887.

The theme of 'Boonah 1' was back to basics, which had something to do with the fairly simple surrounds but also recognition that a new team needs time together to build the foundations for effective leadership.

The other change was the introduction of a 'phone-box', for all team members to deposit phones and iPads at the beginning of each day. While it sounds a bit school teacher-ish, the introduction of the phone box was actually very effective in removing distractions and ensuring that our focus remained in the room. After people got over the initial shock, all felt that it was actually quite liberating!

The 2 days were a tremendous success. The location worked well, the team stepped up and Richard and Lisa brought their A-game to the facilitation. I always enjoy time away with the team, but I particularly enjoyed the opportunity to set out my vision and expectations while bringing a new team on the journey.

Since returning to the office, our leaders have a shared understanding and appreciation for our corporate strategy and are working more collaboratively with each other. However, the most pleasing thing has been watching our leaders cascade the key outcomes with their own teams.

In the end it's probably not about the place, it's about what you do there.

A new story begins for TransLink.

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





01



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01 MATT LONGLAND, LEADER SPEAKS  
02 NEIL SCALES, DIRECTOR GENERAL, QUEENSLAND  
DEPARTMENT OF TRANSPORT AND MAIN ROADS



# UITP ANZ

BOARD STRATEGY EVENT, JULY 2013



AUSTRALIA & NEW ZEALAND



# Weaver Vale Housing Trust

## Wrestling alligators

Many readers will recognise Steve Jennings, Chief Executive at Weaver Vale Housing Trust, from previous Yearbooks and a lucky few will have seen him speak at the 2010 Facilitators Conference. We have worked with Steve for a number of years and a highlight of our calendar is hearing his annual Leader Speaks at his Strategy Development and Annual Planning Event. This is, without fail, an inspirational session which has the added effect of giving the UIC something to think about too. This year he shares some thoughts about leading change.

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When I was asked to prepare an article for this Yearbook, I decided to have a look at what I had produced for the 2013 Yearbook.

In the last edition I contemplated how I had to trust the Strategy Development and Annual Planning process to help us produce clarity around what we needed to change if Weaver Vale was to face the challenges coming our way. I predicted it would be a busy year ahead. I certainly got that right! The last 12 months has seen the onset of Welfare Reform, the introduction of the so called Bedroom Tax, continued cuts to public sector services and increased energy and living costs impacting on households across the UK. All these have provided particular challenges to both Weaver Vale and the customers who live in our homes.

Our new Corporate Plan, which we have called our 2020 Vision, unsurprisingly, contains a number of new strategies aimed at dampening the impact of the above problems, whilst recognising the on-going challenge of continuously improving the core services we provide to our customers.

Regardless of what sector you work in, I bet you recognise the dilemma of how best to rise to new challenges whilst improving what you already do. As someone once said, "It is difficult to remember that your original intention was to drain the swamp, when you are wrestling with alligators". The past year has seen us roll out the first phase of the new plan and this has been around ensuring that we have the right processes, competencies and structures in place to deliver the new strategies and help tame the alligators.

The changes we have made to our strategies and our Annual Planning process appear to be serving us well. We are making good progress on most of the Strategic Achievement Measures we set and the majority of our staff recognise that we need to change and are 'on the bus' for this difficult journey. What has also served us well is the recognition that it is not only front-line staff that need to be supported through change but that their managers and team leaders also need support.

This is where, once again, our friends at the UIC have helped us; this time with the process of leading change. We worked with them to produce a number of bespoke events that enabled us to share best practice amongst our managers and team leaders. It helped us drive up clarity and accountability for leading change. One of our key messages was that managers and team leaders are also responsible for leading change, not just the Chief Executive. They were able to take away a set of tools, techniques and an approach that would give them and their team confidence that we know where we are going and most importantly how to get there.

This support will now be embedded as part of a personal development programme we are rolling out for our leaders, which we have called STEPPS - Skills, Tools & techniques, Engagement, Processes, Policy, Support & coaching. This is a first for us, as it involves us exploiting the depth of management experience already held across Weaver Vale and sharing it with those new to management or in need of a refresher and/or support.

It is early days but initial feedback tells us that this will be a real help for those who are responsible for leading change. I will let you know how we get on in the next Yearbook and if we managed to tame the alligators!

*Steve Jennings*  
Chief Executive  
Weaver Vale Housing Trust



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- 01 LEADING CHANGE, SEPTEMBER 2013
  - 02 UNIVERSAL IMPROVEMENT SKILLS, NOVEMBER 2013
  - 03 STRATEGY DEVELOPMENT EVENT, SEPTEMBER 2013
  - 04 FACILITATOR DEVELOPMENT PROGRAMME, MARCH 2013
  - 05 LEADING CHANGE, SEPTEMBER 2013
  - 06 LEADING CHANGE, OCTOBER 2013
  - 07 EXECUTIVE EVENT, JULY 2013
  - 08 STRATEGY DEVELOPMENT EVENT, SEPTEMBER 2013
-



GARY HOOD

to post-it all the objectives, interdependences and pull out what were sub-projects. The third step was to 'now', 'soon' or 'later' each piece of work. Finally we agreed overall timescales and then phased the 'now', 'soon' and 'later' projects into Now - July 2013 to December 2013, Soon - by April 2014 and Later - by March 2015.

We then took each project and assigned a Project Leader and Champion. We also looked at the interdependencies between projects to see if we could link to any existing or planned work to save time, resources, duplications, etc. An action list was drawn up to operate alongside this. We then held a further pre-meeting just to revisit and plan the first steps of the project.

The project is progressing well and we have a new 'Work and Enterprise Team' who are focussing on the objectives of the project and who have utilised their Annual Planning effectively to ensure clear focus and direction on helping deliver this strategy.

*Gary Hood  
Service Improvement Manager  
Weaver Vale Housing Trust*

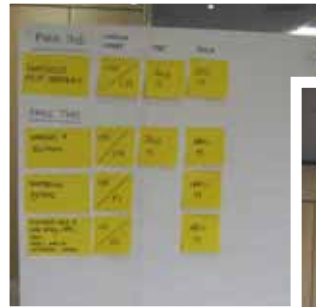
## Customers into work

This year we have two pieces from Gary Hood, WVHT's Service Improvement Manager. Gary has been applying UIMPROVE in his role for a number of years and also has the job of coordinating the Trust's Facilitators. You'll find Gary's second article in the Facilitator pages.

One of the Trust's nine strategies, within our '2020 Vision' is 'Customers into Work'. Customer feedback informed us that getting customers into work was one of their top priorities so this strategy aims to increase the number of our customers in paid employment. Our view is that if customers are in employment they are more likely to pay the rent and be less affected by Welfare Reform. Through employment, the economic profile of neighbourhoods will improve and overall wellbeing will improve.

In order to deliver the strategy, we now have a corporate project, also entitled 'Customers into Work'. The strategy has a series of short-term and long-term SAMs, with the project set up to ensure that it helps deliver those expectations. Lucy Goldsmith, one of our Facilitators, has worked closely on this project to ensure that it was planned effectively and to consider both short-term and long-term objectives.

The process started with a pre-meeting to have an initial look through the remit. It became apparent that the remit held too much information with no discernible timeframes or structure and was too big to tackle all at once. Our first step was to review the methodology and agree it was a major project and that our Exec Team would act as the Steering Group. Our second step was



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# Yarra Trams

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- 01 UNIVERSAL IMPROVEMENT SKILLS, AUGUST 2013
- 02 Z CLASS TRAM, FITZROY STREET, ST. KILDA
- 03 TRUSTY B CLASS TRAM ON SMITH STREET, COLLINGWOOD
- 04 BRAND NEW E CLASS TRAM PASSES THE ROYAL EXHIBITION BUILDING



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# Special feature - The Corporate Brain and Leader Speaks

At the UIC, we have the pleasure of working with excellent and inspiring Executive Teams. Two factors are crucial to their success. First, the ability to function as a Corporate Brain rather than a collection of talented individuals. Second, the ability of the leader to give clear and consistent direction. In this section we look to some of the most inspiring leaders we work with to share their thoughts on fostering the Corporate Brain and delivering leadership by that most critical of techniques - the 'Leader Speaks'.

**The Corporate Brain**  
— A peculiar phrase  
Michael Newey

**Leader Speaks**  
— What it says in the manual  
Richard Capper  
— The challenge of delivering a Leader Speaks  
Steve Jennings  
— Nine tips  
Dave Power  
— What is the real point of Leader Speaks?  
Michael Newey

# The Corporate Brain

## A peculiar phrase

There is a peculiar phrase often used by Richard and colleagues - "the state of the Corporate Brain".

I first heard this expression back in 2011 when we were having our annual review with Richard and Lisa. I have to admit that he added some adjectives to the phrase that were not entirely complimentary about the cohesiveness and the strategic awareness of my team. It was not that we were doing anything wrong; it was not that we had got no idea of the strategy that we were trying to achieve; but it was all about the reality that we were not all joined up well enough and we were not delivering the best possible results. We were creeping into silos.

The previous year had been unsettling for the organisation. The new coalition government were making or promising changes that would inevitably affect our business model and the lives of our tenants and clients. We had had some senior staff changes and we were visibly less cohesive than we had been a year earlier.

Richard's tactics were not popular - if you know Richard yourselves, you may have experienced his belief that blunt is always best, even if some people find this

uncomfortable. At the end of our first day of two, the team was feeling bruised. But in hindsight this was because the team was not working as well as it should have been and it was not enjoyable having someone hold a mirror up for us to look at ourselves.

The Corporate Brain is an excellent phrase to express the condition of the executive management team. It talks about the health of the executive leadership's teamwork; the extent to which the executive are all pulling in the same direction; the existence, or preferably non-existence, of silo working in the organisation; and the sense to which there is a clear unified vision of the way ahead. A healthy Corporate Brain means no secret agendas and a strong sense of mutual support and encouragement.

When everything is in place, organisations get on with the delivery of what they exist for and can cope easily with any challenges that appear en route. When the Corporate Brain is not so evident, departments move in different directions and challenges easily become calamities.

Just as with our own individual health, the health of the Corporate Brain cannot be taken for granted. If it is working well right now, something could still go wrong if you are not looking after it. Complacency is the biggest threat to Corporate Brain health. Just as it only takes a slip on an icy pavement to break a leg, inconsiderate behaviour by an individual can easily damage the Corporate Brain.

I am pleased to say that a year after our very uncomfortable UIC session, Richard was far more complimentary. There was evidence of the Corporate Brain at work; there were credible plans in place to meet the challenges facing the organisation; there was a feeling of cohesiveness and mutual support between directors; and there was a reluctant state of optimism despite the coalition's policy changes.

Part of the changes were about communication between individuals and at team level; using UIMPROVE techniques properly as 'the way we do things round here'; investing time in understanding each other better; and learning again how to support not ignore each other.

Sometimes it is important for the executive to take time out away from Project Steering Grids and other formal processes, as we have done recently. We in effect reintroduced ourselves to each other and discussed our personality and style differences - and how they make us a viable group, rather than weakening us. We have also used some facilitated psychometric tools such as Myers Briggs and FIRO-B to help us gain better mutual understanding - not to justify ourselves, but to appreciate how our differences add value. We will be rolling this type of event out further within our senior management team - so that we can help Directorate Brains to stay healthy too!

I would encourage every organisation to critically and objectively examine the state of its Corporate Brain. I am sure that Richard and colleagues are always willing to give you a health assessment, but the reality is that we should already know. If all is well, don't be complacent. If there are signs of ill health, sort it out.

*Michael Newey  
Group Chief Executive  
Broadland Housing Group*

# Leader Speaks



RATTOMETER



THREAT LEVEL: MEDIUM



01

## What it says in the manual

Two of the strengths of UIMPROVE are that it sits on the firm foundations of the work of the giants and has the advantage of more than 20 years of development ‘in the field’. So let’s start with a little history. The 1990s saw the biggest structural change in UK railways since nationalisation in 1948. British Rail was split into many components. Train Operating Companies would run the trains and Railtrack would be responsible for track, signalling, stations and other fixed infrastructure and for creating ‘access’ to the track for freight and passenger trains to run. This was the reorganisation to end all reorganisations. In March 1993 Peter Strachan was asked to become Railtrack’s Director Midlands with the remit to set up and run one of the ten Zones. The Midlands Zone would encompass a vastly complex geographical area and around 1200 staff.

One day in Wyvern House, Derby, Peter said something along the lines of: “I think it would be a good idea to get each of the new management teams together for an overnighter”. So was born what was to become the UIC’s first Team Event. He also said: “And I want to come along and say a few words to each team”. This went on the draft agenda as ‘Peter speaks’ and remained thus until we worked with another leader who was not called Peter at which point it changed to ‘Leader Speaks’.

A couple of years later in Liverpool, Dave Power, then Director of Quality and Planning for Liverpool Housing Trust said: “I think I need you to design some leadership training for us”. So was born the 3 day course now known as Universal Leadership Skills. The original version of this course didn’t even mention Leader Speaks (an obvious omission with the benefit of hindsight) but, as the years progressed and colleagues at the UIC saw more and more, better and better Leader Speaks, we started to write down what made a good Leader Speaks good. In classic UIC fashion, this has now become The Leader Speaks Guidelines which we give to all prospective leaders speaking, a session on Universal Leadership Skills and, of course, how to do it in the manual - in this case The Complete Guide to Leadership (not as well known as The Complete Guide to Improvement but just as useful and practical).

In recent years, we have recognised the importance of a Leader Speaks in developing the Corporate Brain of an organisation. Having said that, Leader Speaks is not solely the domain of the Chief Executive. Any manager that leads a team should be doing this - at least annually.

## There’s the history lesson. So what does it say in the manual?

Section 13 is called ‘Leading your Team’. In here you will find six principles and six actions. Action 6 is ‘Do (we probably need a better verb) Leader Speaks’. I am not going to reproduce the three pages in full here. Instead I have picked two headings that set the context for the following articles.

### What is a Leader Speaks?

A ‘Leader Speaks’ is an opportunity for you to stand up in front of your team and tell them what’s on your mind. This is perhaps the most important of all the sessions at a Team Event. If you are the Chief Executive, this is particularly important as it sets the tone for the whole organisation. Don’t underestimate the importance of this rare, perhaps only once-a-year opportunity, for the people who work for you to hear what you have to say.

### Developing you as a leader

Carrying out regular Leader Speaks is the most powerful thing you can do to develop yourself as a leader.

- > Preparing a structured Leader Speaks makes you think. As a result of this you may well change the direction or priorities of your team.
- > Every time you have to explain your thinking, the quality of your thinking and explanation thereof improves
- > The discipline of standing up in front of your team and telling them what you think, good and bad, develops your confidence

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01 MATT LONGLAND

02 SARAH REITER

03 LOUISE PARROTT BATES AND DOUG CRESSWELL



STEVE JENNINGS

## The challenge of delivering a Leader Speaks

I really enjoy the challenge of delivering a Leader Speaks. It makes me think about what are the small number of key messages that I need to communicate and how can I formulate a common narrative that is both authentic for me and is easy to understand and repeat across the organisation.

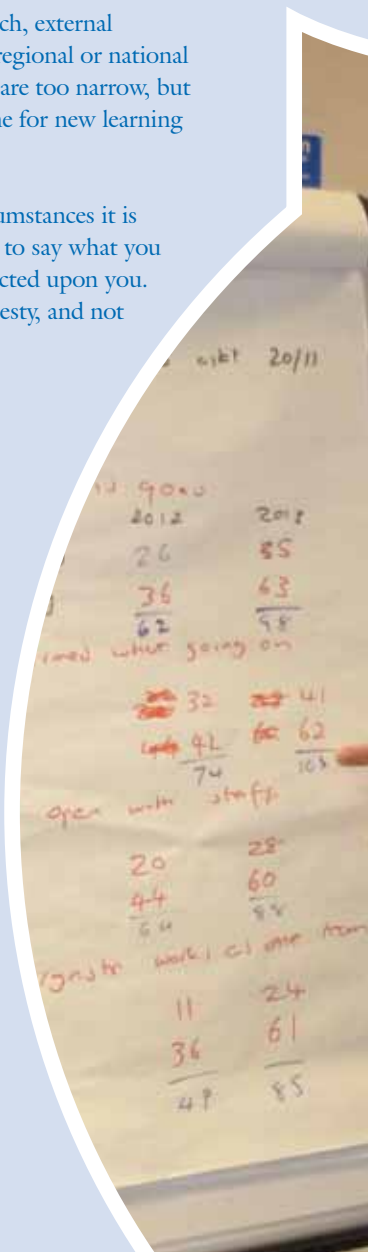
Someone once said to me that it is easy to write a long report but it is far more difficult to write a short one. For me, the same applies to delivering a Leader Speaks. I try to think about three key things I want to convey as too many can get lost in translation. I don't always manage to keep it to this number but it is a good discipline and it hopefully (!) prevents me from producing a long verbal ramble covering all the work of the Trust.

*Steve Jennings*  
 Chief Executive  
 Weaver Vale Housing Trust

## Nine tips

As a leader your message needs to be apposite, ordered, directive and open, up-to-date and consistent with the development of your organisational narrative. It needs structure and it needs to set a tone for the event. Your audience has an expectation you have thought about what you will say and it will both add value to them and is important to their work. Here are some tips.

- > Use familiarity to focus on your agenda. Address known team discussions and questions that are active, organisational rumour, “things they are not telling us”, so you clear background noise, answer obvious questions, give clarity so your audience concentrate on the organisation’s agenda and not theirs.
- > Keep the journey and narrative continuous. Remind them of what we said, did, would do, went well, didn’t go well, a year ago, 6 months ago or a month ago to reinforce planning, learning direction and forward momentum.
- > Be clear about your priorities. Be specific and use “I want”, “I believe” and what you see as the priorities so discussion is clear in scope, rule in and rule out any options and be clear about this in answer to direct questions.
- > Give insight. This could be facts, research, external environment, trends, influences, other regional or national issues. Proposals and arguments which are too narrow, but neither waffly nor academic, set the tone for new learning and how others should assess options.
- > Be personal. In certain events, and circumstances it is right to say what you personally feel or to say what you personally feel of how issues have impacted upon you. Done with relevance, integrity and honesty, and not sentimentality, it reinforces dialogue.
- > Target your comments to teams and individuals as necessary. Praise, express dissatisfaction, set an agenda and priorities. People go away with their “bit” as well as the bigger picture.





- > Be a translator. Distil policy debates, technical issues, organisational culture and noise, management speak and jargon into the impact on your organisation, where action is needed, what it means and whether it's relevant.
- > Be clear on what is known, unknowable, and what is in your control and what isn't. This flags a list of issues that need to be recognised and possibly reappear later and cuts out diversionary issues.
- > Lastly, set out a concise list of next steps, timescales and actions. Always take questions through Round Robins. This checks communication, listening, how much is understood and whether people have heard the right things.

*Dave Power*  
*Chief Executive*  
*City South Manchester Housing Trust*

DAVE POWER



## What is the real point of Leader Speaks?



I well remember the very first time we worked with Lisa and Richard 4 years ago. It was the day after my daughter's 15th birthday. I remember the date so well because

my phone rang as I was sitting in Pizza Express in Norwich with about eight teenage girls. It was Lisa on the line to remind me that I had to give a Leader Speaks the next morning. A late night followed!

At first I was a little unsure as to how to use the session and in some ways I continue to explore how to deliver the best 'speaks' possible.

When we are undertaking our Annual Planning sessions, it becomes an amazing opportunity to deliver first hand a message about where the organisation is; what challenges we currently face; and my own thoughts and ideas on how we should be responding. Another real strength of this part of the process is that the team then discuss your message in pairs before the Round Robin providing feedback and asking questions.

What advice would I give to someone contemplating their first Leader Speaks?

Some rules that I personally adopt:

- > Decide what your key message is before you even go near a flipchart
- > Take this task seriously and prepare properly
- > Do not fall into the trap of your flipcharts becoming a 'brain dump'
- > Plan your 'speaks' in advance of picking up a flipchart pen
- > Structure your 'speaks' so people know what you are dealing with and where your presentation is going
- > Tell the group on your first sheet your key message - so they know in advance what you are trying to share
- > Tell the group on your second sheet what your agenda is - what are the topics you are going to cover
- > Repeat your key message on your last sheet, so that it is the last thing you say - i.e. tell them what you are going to say; tell them; and then tell them what you have said
- > Do not fall into the trap of writing down on the flipchart what you want to say
- > Flipcharts should be a guide to the 'speaks', not a script. You do not want to put people into the situation where they have to decide whether they are going to listen to you or read your handwriting. If you do that - most of the time people fail to do both adequately.
- > Consider the use of pictures - either your own artwork or even (if desperate) gluing on to the flipchart pictures and photographs. A picture speaks a thousand words and is much stronger than just words.
- > Lastly - remember that your 'speaks' will set the tone for the rest of the day. This is not just an exercise to get the day going, it is a crucial part of the day. If you are giving the 'speaks', you are taking responsibility for ensuring that the time and money spent in convening the session is well spent.

*Michael Newey*  
*Group Chief Executive*  
*Broadland Housing Group*

03

# A UIC potpourri\*

- Chatterbox
- The Sunday Times 100 Best Not-For-Profit Organisations to work for
- New beginnings
- Dissertation UIMPROVE
- Public courses
- The 2nd Annual Performance Conference
- Correspondence
- Kirkcaldy 4 All
- Out and about
- Dining on-board
- Is the UIC haunted?
- XPT
- Spider

\* Potpourri is used inside the home to give the air a pleasant smell. The word 'potpourri' comes into English from the French word 'pot-pourri'. The French term has two connotations. It is the French name for a Spanish stew with a wide variety of ingredients, specialty of the town of Burgos. The word was taken and copied by the French during the Napoleonic occupation of Burgos (1808-1813). Literally the word 'pot' in French has the same meaning as it does in Spanish and English, while the word 'pourri' means rotten. In English, 'potpourri' is often used to refer to any collection of miscellaneous or diverse items. In this section we focus on the fragrant rather than the rotten.

# Chatterbox



Lou Tribus teaches a Year 4 class in a small private primary school in central London. In this article, she recounts how she took a different look at chatting in the classroom.

One of the benefits of a small private school is small class sizes: I had 12 children last year. Another benefit is that we have more freedom to be creative with our curriculum: we are guided, but not bound by the UK National Curriculum. This has allowed me to find small ways to introduce quality tools and systems thinking to my pupils.

I have taken small steps to teach quality methods to my class for the last 7 years, since attending a David Langford course. My pupils have enjoyed learning to use Fishbone Diagrams (Ishikawa Diagrams), Flowcharts, parking lots, hot-dots, PDSA planning sheets and capacity matrices. I have also introduced 5 whys, and if-then diagrams. I've used these tools to solve problems at school and to help them write better stories or solve maths problems. I haven't however, collected much data, nor have I used data with the children as part of the quality process.

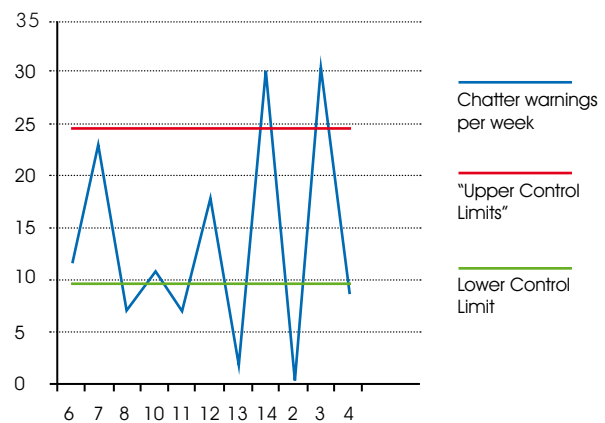
Determined to change this, I declared that 2012-2013 would be my Year of Data. One large board in my classroom had Run Charts for weekly whole class total spelling and mental maths scores, weekly whole class totals of how many rewards or sanctions given to the children, and one chart labelled 'chatter' (rewards and sanctions are school policy, unfortunately). The children also had individual Run Charts in their books for weekly maths and spelling scores. They charted their own progress weekly. I did not put individual scores on the board. My intention is to look at the system, not make children feel like failures if their scores are low.

I had a very lively class. They would burst into chatter at the least provocation. Like many children, they had not yet learned to moderate their own behaviour and depended on adults to do it. This is normal: children learn to moderate their behaviour at different rates. It can be quite exhausting to have a group of immature children who depend entirely on you to keep their behaviour in control. Sometimes I felt I couldn't relax for a moment. They agreed with me that 'chatter' was our number one problem and they wanted to improve. So we began to keep a Control Chart of how many times each day the children get told off for chattering (a 'chatter warning'). By Christmas it was becoming a very interesting chart, with a sharply zig-zag line. In February, I calculated the upper and lower control limits based on a term and a half of data and presented the chart to the class. I really did not know what they would make of it.

Immediately, most understood that something exceptional had happened at week 14 of the first term, and week 3 of the spring term that made them chatter more than usual (Christmas week, and a trip to the National Army Museum). We didn't know what

happened in week 13. In week 11, I was ill and missed 2 days of school, and in week 2 of the spring term I declared an amnesty on chattering as I was too busy to deal with it! I was amazed that they understood the chart so quickly, and even more amazed when one boy identified the area between the control limits as 'normal', declaring that "a little chatter from children is normal!"

The next step was to discuss and try out strategies to improve the situation. The children discussed the questions "When is it okay to chatter? When is it not allowed?" They came up with two lists for each situation.



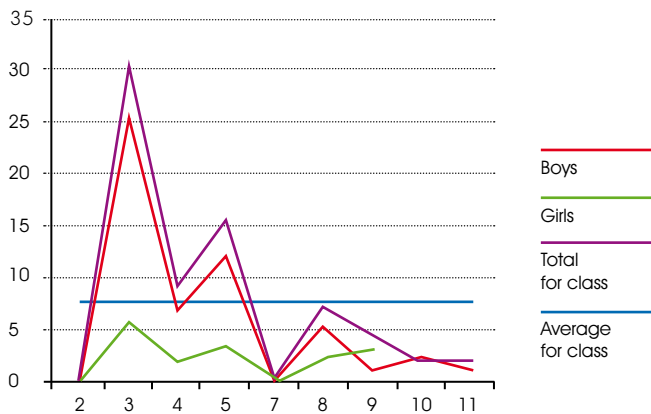
Chatter Control Chart for Term 1

Chatter is allowed: during free time, at play time, at lunch, on the bus, when changing for PE or swimming etc.

Chatter is not allowed during a lesson, when an adult is speaking, when lining up, when moving around the school and during transitions. I was interested to discover that the children could explain the reasons why they shouldn't chatter in the first four instances, but they didn't know what a transition is. It is the short interval between lessons, or within a lesson when we change from one activity to another.

Here are some of their suggestions for improvement, and the Run Chart showing the effect of our changes. We tried out a new strategy every week.

- (1) *Mrs Lou should be very, very strict, shout every time anyone chatters and give out lots of chatter warnings*
- (2) *Make separate charts for boys' chatter and girls' chatter*
- (3) *We should change the configuration of the classroom so that children face forward instead of being in groups facing each other*
- (4) *Rewards for a good week with little chatter - 10 minutes free play at the end of the week*
- (5) *Mrs Lou should remind the children when we are in a transition*



In the beginning of the Spring term (Week 3), we tried the 'strict' approach. I shouted and nagged and scowled at every noise they made! When the children saw the data, they agreed that it didn't work. Changing the configuration of the tables made a small difference as did taking separate data for boys and girls. Chatter was clearly more of a behaviour issue for the boys than the girls!

In my opinion, which I think is supported by the data, the most effective strategy was to determine, as a group, an Operational Definition of 'chatter', set parameters for when it is and is not allowed and why. We also came up with a definition of 'transition' and discussed why transitions should be chatter-free. As a class we had a single purpose: to make the experience of being in Mrs Lou's class more enjoyable for everyone by reducing the amount of chatter at certain times. By the end of the term, children were routinely reminding each other "No chatter, it's a transition!"

I would be exaggerating if I said that there was no more chatter in my class. However I can say that it was no longer a big problem. As a class we could move on to other things, such as learning about life in Victorian London. The children in my class were very happy not to be living in an era where they would have been caned for chattering during a lesson!

*Lou Tribus*  
Ravenstone School, London

# The Sunday Times 100 Best Not-For-Profit Organisations to work for

A number of our clients are externally assessed by the Best Companies organisation as part of the 'Sunday Times 100 Best Not-For-Profit Organisations to work for'. This in itself is an example of continuous improvement as we are pretty sure the order below correlates almost exactly with the number of years the organisations concerned have been doing this. It is always a real pleasure to see our clients doing good work and being recognised for it so congratulations for achieving the following places in the 2013 'overall' and 'leadership' categories.

## Overall

26	Weaver Vale Housing Trust
37	The Regenda Group
75	Broadland Housing Group
96	City South Manchester Housing Trust

## Leadership

8	Weaver Vale Housing Trust
24	The Regenda Group
54	Broadland Housing Group
57	City South Manchester Housing Trust

# New beginnings

The end of 2012 and beginning of 2013 were interesting times for me. The New Year for 2013 saw me move from a small organisation well versed in the ways of UIMPROVE to a large organisation with their own systems and processes in place. On top of that, while still in a role based around my professional qualifications as an Urban Planner, the new role was in a completely new industry - Aviation. I immediately saw the benefit of adopting some of the UIMPROVE tools and techniques, including using the Project Set-Up sheet to define projects, the Now-Soon-Later approach to project priorities and workshops to kick-start and review lessons learned. I quickly got a reputation for butcher's paper and post-it notes but overwhelmingly the response from the business and stakeholders was positive - the tools really do work and work well when the content is new territory.

As a manager who has done the Strategic Improvement Programme, rather than a formally trained Facilitator, I've faced the challenge in the new organisation where I have been both leading and facilitating sessions. While I recognise that is one of the UIC no-no's, not all situations are perfect. I've been very appreciative of the ongoing support from the UIC - huge thanks to Lisa and Richard - for sharing ideas and being available to discuss facilitation techniques. I'm excited about the further application of UIMPROVE tools and techniques in 2014.

*Eleanor Nightingale  
Airport Planning Manager  
Virgin Australia*



01



02

01 ELEANOR  
02 FLASH BACK TO AUGUST  
2010 - ELEANOR AND TRANSLINK  
COLLEAGUES ON THE STRATEGIC  
IMPROVEMENT PROGRAMME

# Dissertation UIMPROVE



Working for Broadland Housing Group, I have been fortunate enough to have the opportunity to study towards an MSc in Housing at Leicester De Montfort University.

Whilst the period of study provided me with some satisfying results and has unquestionably broadened my knowledge of this field, there is little point denying, at times it tested my ability to manage a work/life balance and my sanity to the limit! Throughout the study I was acutely aware looming at the end of the course was the master of all time management challenges, the dissertation. Having made a laborious task of an undergrad dissertation with the 'luxury of time' university affords you, it is fair to say I was not relishing the prospect of balancing a dissertation with full time work (by this point, you will already have predicted where I am heading with this). However, I thought, I have developed since uni, I have acquired skills since uni, I have managed projects since uni, all of which will help me overcome this behemoth. Enter UIMPROVE. Well no actually, not yet.



There are times where we do not necessarily do what is best for us. At the outset of this project I had every intention of religiously following a project methodology making incredibly effective use of my time and finishing early. In fact, in September I did begin this way. However, typically I procrastinated for a number of weeks resulting in me feeling under pressure to make some rapid progress to ease the growing apprehension. At this point my well intentioned project plan disappeared out of the window and I resorted to my (un)comfortable undergrad approach of 'muddling through'.

By the end of January I had collected my primary and secondary data and the analysis beckoned. With the primary data analysis I intended to formulate an understanding around the ability of social and private rented sectors to meet the needs, wants and aspirations of tenants living in Norfolk. My primary research consisted of several interviews with families living in some BHG properties in Great Yarmouth and in the private sector. This produced a great volume of qualitative audio data to analyse and here enters UIMPROVE. With such a large volume of data I realised this had the potential to take months to analyse. I wanted to draw upon key themes across all of the interviews and recognised Clustering-by-Theme would easily enable this. I adapted the tool to make it appropriate for the project. However, fundamentally the logic of the tool saved me a massive amount of time and produced clear results which were easy to analyse.

Happily, I managed to complete the dissertation with a week to spare and had it confirmed in July 2013 that I had passed my MSc with Merit. Phew! Had I managed to stick to the original project plan I believe I would have been able to complete the dissertation well ahead of schedule without the associated stresses. Having said this, if large projects were easy to manage the UIC may begin to question their fundamental business assets. As it is, this is a good example of where you can apply your UIMPROVE knowledge to everyday life and achieve success.

*Adam Clark*  
*Area Manager (King's Lynn)*  
*Broadland Housing Group*

CLUSTERING-BY-THEME ON AN INDUSTRIAL SCALE





01



02

# Public courses

- 
- 01 UNIVERSAL IMPROVEMENT SKILLS IN ALSAGER, CHESHIRE, OCTOBER 2013
  - 02 UNIVERSAL IMPROVEMENT SKILLS IN ALSAGER, CHESHIRE, APRIL 2013
  - 03 FACILITATOR DEVELOPMENT PROGRAMME IN ALSAGER, CHESHIRE, MAY 2013
  - 04 UNIVERSAL IMPROVEMENT SKILLS IN MELBOURNE, JUNE 2013
  - 05 UNIVERSAL LEADERSHIP SKILLS IN ALSAGER, CHESHIRE, OCTOBER 2013
- 



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# The 2nd Annual Performance Conference

The 2nd Annual Performance Conference run by the UIC in collaboration with the UITP ANZ was held on 26 June 2013. Once again we were privileged to have a remarkable variety of top quality speakers and the conference attracted a wide range of attendees from all modes of transport across Australia and New Zealand. Thank you to K&L Gates (especially Catie and Rebecca our fantastic lawyers), who kindly hosted the event at their Sydney offices with a 31st floor view of the harbour bridge.

The 2014 conference will be held in Brisbane. The dates were still to be confirmed as we went to press.



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- 01 TIM ARBUCKLE, PARTNER, DELOITTE
- 02 AL GEYER, CHIEF OPERATING OFFICER, BRISBANE TRANSPORT
- 03 INTERNATIONAL SPEAKER, DAVID CROME, GENERAL MANAGER WEST, FIRST GREAT WESTERN
- 04 KEYNOTE SPEAKER, FERGUS GAMMIE, DEPUTY DIRECTOR GENERAL - TRANSPORT SERVICES, TRANSPORT FOR NSW
- 05 LISA, REBECCA, CATIE, RICHARD

K&L GATES





# Correspondence

Hi Denise

I hope you are well.

Since our telephone conversation have you had chance to pull together any thoughts on the next steps for our project to review the repairs satisfaction survey?

Any suggestions you can make or advice you can offer would be greatly appreciated.

Many thanks  
Caroline Hubbard  
Housing Manager (Customer Services and Involvement)  
South Yorkshire Housing Association

## REPAIRS SATISFACTION SURVEY

Hi Caroline,

At long last a response from our conversation a few weeks ago. We had a chat about whether to do an Ishikawa Diagram and decided that this probably wasn't the best approach as it was clear that one of the main factors in low responses rates was the lack of methods of collecting repairs satisfaction data.

In general terms I have some tips on satisfaction surveys which may or may not be useful so here goes:

- (1) Increase the methods of feedback in particular to include technology, e.g. handhelds and mobile devices (the more you can access the information real-time the better and this saves input downstream)
- (2) Be clear about what you are using the feedback for and make sure the link to improvement is clear, i.e. what do you do with the data and how does it link to projects?
- (3) Develop corporate standards for surveys which include answer scales. This makes it easier to interpret as everyone is familiar with the scales and style of questioning including your clients.
- (4) Respondents are more likely to give a more positive response on the phone or in person so be aware of that
- (5) Be clear about when these surveys and others are published because potentially you could bombard the customer with lots of questionnaires at once. Develop a calendar.
- (6) Be systematic about how you collect, store, analyse and report on the satisfaction data.

Introduce a system for surveys. The more you can automate this process and make it real-time the better

Hope this helps and happy to have a chat about this in more detail so feel free to give me a call and remember, there's always more in the manual.

Hi Josie

I hope that you are well.

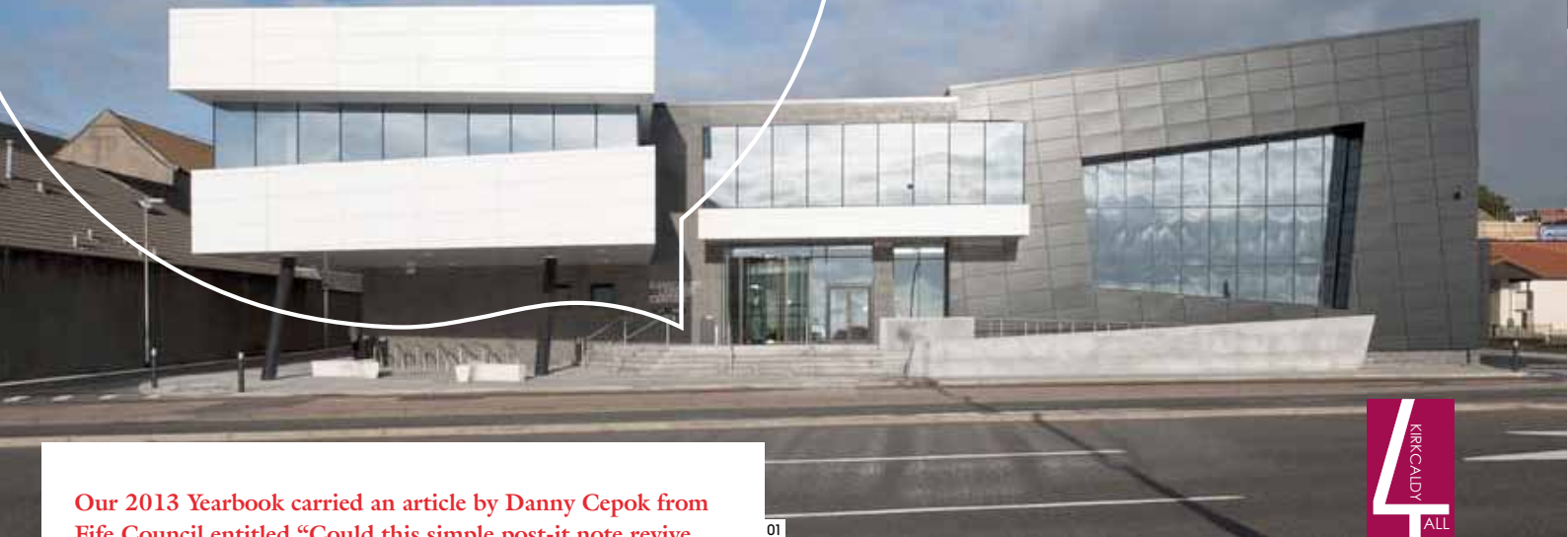
I thought of you guys a few weeks ago when I started my NEBOSH training and was so surprised by how efficient I was at taking notes! Such a basic thing but it's all as a result of the gentle push that you guys gave me about using a Notebook before Christmas.

David Pinder  
Duty Station Manager Oxford  
First Great Western

## NOTEBOOKS



# Kirkcaldy 4 All



**Our 2013 Yearbook carried an article by Danny Cepok from Fife Council entitled “Could this simple post-it note revive our town centre”. Following on from this, we asked Danny to speak at the 2013 Facilitators Conference. By popular demand, Danny has kindly provided us with an update to the ongoing story.**

In 2012 the town of Kirkcaldy was set a mission to revive its town centre and so it set about holding a summit to generate ideas. But this was no ordinary summit, for although they didn't know it, 120 delegates turned up to a Kick-Start and generated over 300 post-it notes that went on to become a strategy for transformation.

As soon as the summit was over, a new partnership group entitled Kirkcaldy's Ambitions was formed. This was the first time that the Council, public services, local business and voluntary organisations had joined forces to work in partnership to create a 21st century town centre that was more than a street of shops. The vision is one of a vibrant social hub - big brand names side-by-side with independent traders, a community hub of local services, family events, social housing and a thriving evening economy.

Kirkcaldy's Ambitions set about turning the post-it note plethora into a set of short, medium and long-term actions (using Now-Soon-Later) which later developed into a Project Steering Grid. With a sound project approach underway a number of initiatives soon followed, including:

- > A 'Free After Three' parking campaign on the lead up to Christmas that allowed shoppers free parking in the Council's multi-car park after 15.00;
- > A 'Shop and Eat Local' campaign supported by the local newspaper;
- > An agreement with some retailers to give guaranteed interviews to 16-18 year olds applying for posts;
- > A Business Support Grant that helped local retailers develop their websites and multi-media strategies; and

> A series of high profile events:

- \* A production of A Christmas Carol by the National Theatre of Scotland staged in the Old Kirk, a 15th century church in the town centre. The production was so successful that extra shows had to be organised with 50% of the audience coming from out of the town.
- \* The Mad Hatters Easter Tea Party
- \* The Adam Smith Festival that tied in with the opening of the new Kirkcaldy Galleries - an art gallery, library, museum and visitor centre; and
- \* The Fife Carnival, a summer pageant of international street performers that brought over 10 000 people into the town centre.

In November 2013, a new, state-of-the-art £15m Leisure Centre was opened providing a 25m swimming pool, a training pool with a moveable floor, a 60 station fitness suite, a games hall, a dance studio and a children's soft play area. Kirkcaldy Leisure Centre is of a contemporary design located on the waterfront, another prominent feature of the town centre area.

And now, Fife Council has announced a £1m fund specifically to boost Kirkcaldy Town Centre developments. The next set of projects in the pipeline are:

- > Improved visitor signage
- > Modernising the multi-storey car parks with better lighting and wider parking bays
- > A pay-by-mobile parking payment system
- > The development of a Community Hub that will provide benefits advice and support alongside a Credit Union high street presence





DANNY AT THE FACILITATORS CONFERENCE

Kirkcaldy Town House will re-open in March 2014 following a £3m refurbishment to provide a modern Customer Centre for the Council as well as saving the council money in the long term by relocating staff from older buildings into one place. The rebuilding of the sea wall will be complete before the end of 2014, improving the waterfront and providing a modern walkway by the sea. Finally, there is interest by developers keen to build a new cinema on the waterfront, which will boost the early evening economy.

The Kirkcaldy's Ambitions group have now identified Champions and Project Leaders for the delivery plan and act as a Steering Group for the projects. Their approach is clearly making a difference in reviving our town centre.

I look forward to continuing the story next year.

*Danny Cepok*  
*Area Services Manager (Kirkcaldy)*  
*Fife Council*

You can see a video of Danny speaking at the Facilitators Conference on-line:  
[www.theuic.com/FacConf7](http://www.theuic.com/FacConf7)



02

- .....
- 01 KIRKCALDY'S NEW STATE-OF-THE-ART LEISURE CENTRE
  - 02 DANNY TAKING A WELL-EARNED HOLIDAY. "IN QUARTIERA ON THE ALGARVE. ON OUR LAST DAY WE WANT ON A BOAT TRIP OUT TO SEA. A LOVELY DAY BUT WINDY. A GUST OF WIND CAME AND BLEW MY HAT INTO THE SEA. GUESS WHICH HAT IT WAS? THE ONE I ALWAYS TAKE ON HOLIDAY, MY UIMPROVE BASEBALL CAP, PROBABLY STILL WORKING ITS WAY ACROSS THE ATLANTIC OCEAN."
- .....



A UIC potpourri

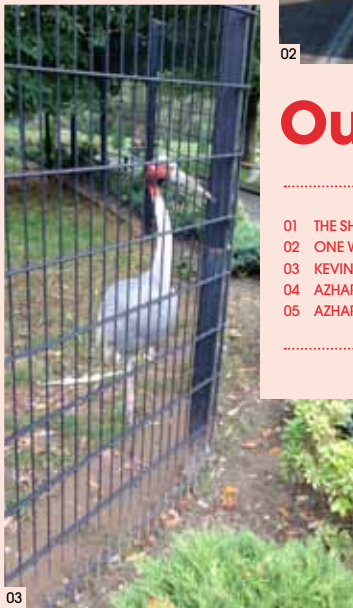
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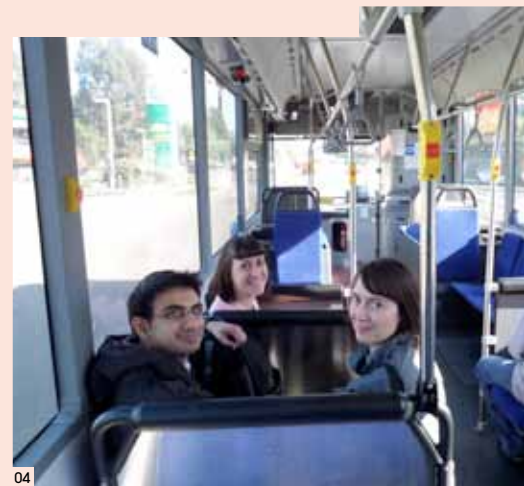
02

## Out and about

- .....
- 01 THE SHEFFIELD TAP - JOHN MORRIS
  - 02 ONE WAY TO GET TO MAASTRICHT IS THE FERRY FROM HULL TO ZEEBRUGGE
  - 03 KEVIN
  - 04 AZHAR, REBECCA AND LISA - ON THE BUS IN SEVEN HILLS
  - 05 AZHAR - DAY TRIP TO IRELAND
- .....



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## Dining on-board

- 01 BREAKFAST ROLL, EAST MIDLANDS TRAINS, DERBY-LONDON  
ST PANCRAS
- 02 LUNCH, NSW TRAINS, SYDNEY-MELBOURNE
- 03 BREAKFAST, DEUTSCHE BAHN, KÖLN-KOBLENZ
- 04 CHEESE, EMIRATES, MANCHESTER-DUBAI



## Is the UIC haunted?

It was only after this photograph was developed that we noticed a ghostly apparition watching this unsuspecting group from Weaver Vale Housing Trust. Moments earlier the temperature in the room had dropped suddenly. Could it be the ghost of Dr Deming checking on Gary Hood's work?





# XPT

Fed up of flying Qantas domestic? Twice daily an XPT leaves Sydney Central bound for Melbourne, one during the day and one overnight. The daytime train covers the 960 km in just under 11 hours and is formed of an XPT, derived from British Rail's massively successful HST or InterCity 125.



# Spider



04

# The Dutch pages

- Public courses
- Start now!
- A new bachelor programme

# Public courses

In the Netherlands, we ran our first Universal Improvement Skills in Maastricht in March 2011 and it has been running once a year since. In May 2013 we started to run Universal Leadership Skills as well.

The nice thing about a public course is that you get attendees from all kinds of organisations. They discover that the issues around projects and improving routine operation are the same everywhere. The teachings of Dr Deming and his fellow improvement giants never fail to impress and although 3 days of filling your head with loads of information in a foreign language will take most of your concentration, everybody always goes away highly energised to try the new found tools and techniques in their workplaces.

So I would like to put the men and women in the spotlight, who spent 3 days away from their busy schedules to learn about improvement, and who promised each other to stay in touch and have a reunion by the summer of 2014. I will be expecting an invitation!

Met dank aan alle deelnemers en jullie enthousiaste reacties!

*Josephine Maranus  
The UIC NL*



01

- 01 ROUGH TRANSLATION: STAY AWAY FROM OUR CAKES!
- 02 UNIVERSAL LEADERSHIP SKILLS PUBLIC COURSE IN MAASTRICHT, MAY 2013
- 03 UNIVERSAL IMPROVEMENT SKILLS PUBLIC COURSE IN MAASTRICHT, NOVEMBER 2013
- 04 YES, YOU CAN FIT FOUR ACROSS!



02



03

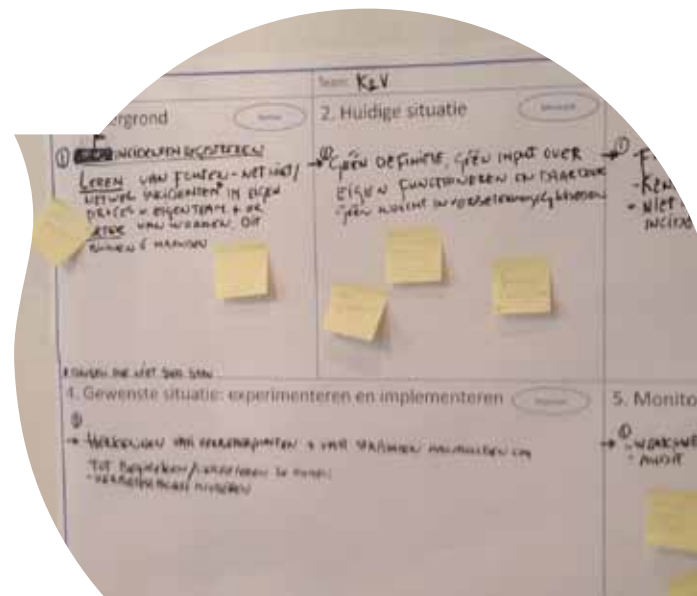


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# Start now!

Part of our last bit of advice to our Universal Improvement Skills attendees is “Do something as soon as possible. Use a tool or methodology. Once you start using these, you’ll never stop. If you don’t start soon, you never will.”

So that is exactly what Mary Derix did at the Maastricht University Medical Centre. Less than 1 week after graduating UIS, she sent us this picture. “It was a lot of fun and everybody was involved!”



# A new bachelor programme

**Brigitte Giezenaar works as a coordinator for Student Affairs at the Maastricht Science Programme, a bachelor programme in natural sciences at Maastricht University. Brigitte attended Universal Improvement Skills in 2011 and Universal Leadership Skills in 2013. We asked Brigitte what she picked up from these courses.**

The Maastricht Science Programme is a very young bachelor programme, which started in September 2011 with its first group of students. Currently there are 168 students enrolled.

Before the programme started, I was involved in the project of setting up a new bachelor programme within Maastricht University. I wished I had taken the Universal Improvement Skills training during that period, since it involved a large amount of work and planning as you can imagine. Fortunately, not long after the official start of the Maastricht Science Programme in 2011, I was enrolled in this 3 day UIC course, which was held in Maastricht itself. The things that I learned during the training were so practical that I use them continually in my job. No matter how small or big the work, you can always make it into a project. And as I was taught - all improvements take place project-by-project.

You can imagine that a freshly started bachelor programme involves a lot of 'new business', setting up support offices and academic networks. I was responsible for the support offices, which meant formalising offices such as the Secretariat,

Recruitment, Admissions, Student Affairs and Examination Committee. I made a separate project out of each office and simply followed the steps as described in The Complete Guide to Improvement. This manual contains a hands-on tool that describes each project step-by-step so you can complete your project successfully, from beginning to end. Easy as that, I can assure you.

Recently, I started with the Academic Leadership Programme at Maastricht University - a programme for personal development of high potentials within the organisation. Part of this programme is working on a project, which you choose yourself (of course within the given guidelines and framework). I took The Complete Guide to Improvement to the first meeting of our project group and Josephine from the UIC to help us as a Facilitator. The end result was a perfect set-up of our project plan and, by simply following the steps as described in the manual, we will have a successful completion I am sure. In this case we chose Planning Methodology and we will be using the Project Worksheets throughout the project as well.

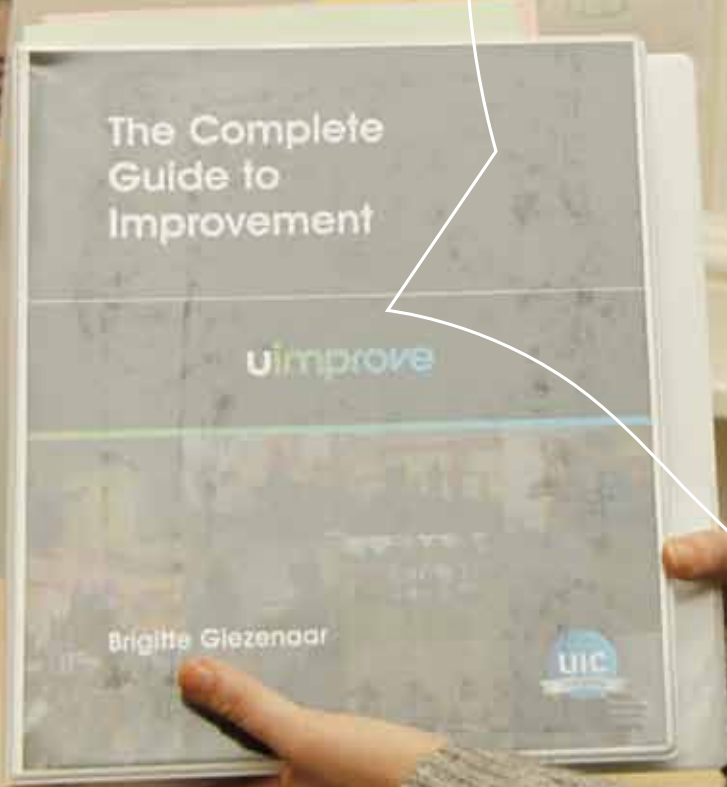
Following Universal Improvement Skills in 2011, this year I also did Universal Leadership Skills, another 3 day course from the UIC. This is a great course for anyone that needs to steer a group of people into a certain direction. I would recommend taking the Universal Improvement Skills course first though, because it's a great basis for the leadership course. The leadership course taught me a lot about how my actions at work trigger certain behaviour with my colleagues, both positively and negatively. For me it was an eye-opener to actually grasp the difference between leadership and management. UIC has a very hands-on approach in how you as a leader take responsibility in projects,

operations, change, individuals, the team as well as your own boss. There is clear background information on where the UIC ideas about leadership come from and different leadership models are explained. The skills part of the course and especially the checklists in the manual, are of great help when for example preparing for a 1-1 with one of my team members, or for setting up an individual (personal) plan for improvement.

So much for the content of the courses I took. Last but not least, I have been on many project/leadership courses over the past years. The way the UIC courses are taught and the dynamics in the groups (for both courses) were amazing. The structure of the course forces everyone to get involved and there is a lot of 'doing' expected, rather than an overkill of information given by the trainer. The UIC people are highly skilled and have proven to be very adaptive in their way of training, depending on the demands of each group. Whereas usually I would be extremely tired after a 3 day course, I was full of energy and motivated to put what I had learned into action. For me both courses were very useful, but very importantly they were fun to be part of!

*Brigitte Giezenaar  
Maastricht University*





05

# Philosophy

- Our pick of the 2014 Points
- 50 years of Managerial Breakthrough

# Our pick of the 2014 Points

## Josie - Break down barriers between staff areas

Most of my working life I've worked in teams either as a team member, leader or manager. When I think of staff areas, I think about the 23 years I spent in the rail industry with its Booking On Points, Mess Rooms, Smoking Rooms, stations and trains. I've experienced staff wearing the same uniform working for a Train Operating Company that held two franchises not acknowledging each other. I've experienced and felt the competitiveness between managers doing the same job in different areas and I have to say that I too fell into that trap.

It's with hindsight and experience of life I can now see that it does not matter which rung of the ladder your foot is on, it's the steps you make to speaking the same language and understanding the aim and strategy of the organisation. People want and need practical tools to do the job. This includes having the opportunity to listen and discuss views and ideas with others at all levels across all departments and areas. Often the barrier comes from no participation and leadership in name only and not action.



## Lisa - Adopt and institute leadership

This is point 7 in Deming's list. Based on my experience, I think this actually should be point 1 as it is the most important factor in determining whether any improvement drive in an organisation is going to be successful. All of the other efforts in Deming's list would fall over if they are not driven and modelled by the leaders of the organisation. As we are keen on saying in the UIC, "we do the same stuff wherever we go". In my mind, it is the quality of the leadership that is the key to whether it works or not. This also applies when we facilitate. The success of any event is largely dictated by the leadership provided on the day. It is also key to whether the people who work for you enjoy what they do or not. Providing clarity on what is expected, coaching and mentoring are really important tasks of a leader but it is also important to trust that people can do their job without the need for over-supervision.



## Vicky - Improve every process

I like this point as a reminder to be systematic and proactive in work planning. We now live firmly in the information age, where distractions flow in a constant stream via the inboxes on our desktops, smart phones, tablets and laptops. It is hard to stay on-track when we are continually tempted into a reactive state, responding to the last problem or e-mail.

Dr Deming reminds us to stay focused, to seek out problems in their early stages and tackle them before they grow. He reminds us to remain proactive and in control of our processes, to listen to what they are telling us. He reminds us to continue to improve what we do 'constantly and forever'. This requires tenacity and focus.

We often discuss with delegates on our courses the profound nature of 'continuous improvement', that for everything you do there is always more to be done. For some this is a scary, mind-blowing prospect but we need to remember that it is also exciting. No-one should ever be bored at work - there is always work to do, improvements to be made. But the place to start is not necessarily the last crisis that occurred, as dealing with this will not necessarily improve anything - it will merely put things back to how they were.

Dr Deming teaches us that fire fighting should not be necessary; that if we 'work continually on the system' we should be able to pre-empt most problems and therefore protect ourselves from being diverted by them. This in turn will free up the time for innovation and improvement in the product or service that you offer.

So how does this fit with UIMPROVE? Well, the link for me is with Annual Planning - that if you sit down with your team once a year and collectively determine what your priorities are for the coming year, you can proactively work on improving the areas which require most attention, therefore nipping many future problems in the bud.

## Josephine - Remove barriers that rob people of their right to pride of workmanship

I have worked in several companies in the service sector that offer a merit payment at the end of the year. Most managers like this system. It gives them a sense of being able to control the outcome of the services provided by the professionals they manage. What usually happens is that targets are set around extra tasks or special projects that are then delegated to their employees. They reason that, if at the end of the year the employees have achieved those targets, they will not only have delivered more than the routine operation they are responsible for, they will also feel rewarded for the extra work.

Great theory. There are however some unwanted side effects. Promising extra money for doing jobs and projects outside routine operation draws the attention of the professional away from routine operation. It makes them focus on the special deliverables that will earn them extra money at the end of the year, leaving them dissatisfied when they fail to make the targets. Moreover the focus is on delivering by a certain date and not by a certain standard.

What DOES work well is to review strategy and routine operation with your employees, deciding together what extra jobs and projects will improve the organisation and awarding employees with the experience of being part of a system that improves itself.

I have yet to discover a company where bonus pay works well in driving employee satisfaction and organisational improvement forward. But if you think you can give me an example I will gladly visit and learn all about it.





## Sarah - Institute training

Training transformed my working life. Which is why Point 6 'Institute Training' is my Deming favourite and it is more relevant in 2014 than ever.

Before I joined the UIC I attended a Universal Improvement Skills course (although it was not called that back then). At the time I considered myself a pretty hard working and competent employee, trying to do my best for a social housing organisation. But when I heard the UIC consultant say the words "there are only two types of work" and the explanation that followed, the scales literally fell from my eyes. I could not believe that no-one had ever explained this to me before. This understanding of the difference between projects and routine operation, along with the rest of the training, transformed my understanding of my own job and the wider organisation. As a direct consequence of the training I became a better employee - more productive, more useful and happier in my work.

Training is often the first casualty in times of austerity. The benefits can be hard to measure but good training will pay for itself many times over. Relevant and timely training can transform your working life and improve your organisation, just like it did for me.



## Andrea - Drive out fear

## Rebecca - Institute training

Modern technology changes rapidly and those who find themselves left behind can miss out on making the most of it in order to expand their business and gain clientele. With a strong program of education and self-improvement entrenched within the business, you can make sure you are always at the cutting edge of technological change and leverage the new skills gained into new opportunities.

It is also important to keep abreast of new technologies purely for operational purposes. Whilst working in the health industry I was tasked to convert a paper-based survey collection methodology over to something electronic. This involved learning new skills so as to develop a web-based survey, to be entered via a number of notebook computers out in the field. In terms of benefits to the company, we calculated we were saving thousands of dollars alone in double-handling, as there was no longer a need for the time-consuming task of scanning in handwritten forms and converting them to a word processing document at the conclusion of the survey.



## Denise - Create constancy of purpose

I have worked with some fantastic leaders in my role at the UIC who strive to create constancy of purpose as Deming instructed. This is the most important of the points for me as it is the responsibility of the top team to get this right. What is it that good leaders do to get this right I hear you ask? Well there are a variety of things we have seen from our clients to create constancy of purpose but I think the following are the most common and effective:

Good leaders take the time to communicate key messages at every level of the organisation to ensure there are consistent messages about what they are in business to do. They do this through regular, well thought out Leader Speaks and through a robust Annual Planning process where key consistent messages are pushed down.

Good leaders work hard to keep things like the mission and vision simple and in the most easy to understand terms so that everyone is clear about what they are in business to do. When the lure of the new and exciting comes knocking it is then easy to see whether it fits with the purpose or it doesn't.

Good leaders have the confidence to stay the course and not get distracted. Clearly defined Strategic Achievement Measures and the use of Statistical Process Control enable them to analyse whether the organisation is heading in the right direction. Confidence also means good leaders take benchmarking with a pinch of salt and don't jump on every bandwagon that other organisations are on.

Good leaders are in it for the long haul. Fads will come and go but good leaders keep their customers happy and stay in business. They have created and communicated constancy of purpose.



## Madeleine - Eliminate numerical quotas for the work force and numerical goals for management

I have occasionally wondered over the last few years what Dr Deming would have thought about the Global Financial Crisis. Over the years running training courses with the UIC, I never get tired of watching the DVD, *The Prophet Unheard*. What resonates really strongly with me is how Deming articulates the definition of a good company - they think long term, they recognise the value and intelligence of their staff, they involve their staff in decision making, they are about strong, long-term relationships geared for improvement, and they care about what their customers think about them. Importantly, they know what their customers think of them. They create value long-term for the broader economy and are in for the long haul.

And then I look at the behaviour of corporate citizens. The scene for the GFC was being set in the 1970s, when Deming already saw that businesses were fixated on short term profits, and that the state of the productive economy was poor. In the 1970s profit margins in the productive economy (the section of the economy that actually makes stuff), were in serious decline. So the people interested in big returns on their investments started pouring their money into financial products to seek higher returns. And then we have an expansion in Wall Street creativity, and the entrance of the packaging up of debt and selling it onto investors. From 1997-2007, \$20 trillion of securitised debt was sold to investors. Can you imagine if investors had been investing in the productive economy, and those businesses were of the ilk that Deming describes? What a different world it could be.

Numerical quotas, targets tied to bonuses paid on monthly or quarterly frequencies do nothing to improve the long-term value of a company. A business has responsibility to the communities in which they operate and have stakeholders that are broader than shareholders. These targets, quotas and bonuses distort the view of a company. These bonus structures, if used at all should be based on long-term performance of a firm, not having hit some arbitrary number each month. In 2007 in the USA, a quarter of the population were being paid wages that were below the poverty line and, between 1979 and 2006, 91% of all income growth went to the top 10% of income groups. The reliance on targets, quotas and bonuses is linked to this increase in inequality. I would love to sit down with Dr Deming, have a cuppa and chat with him about the state of things.



# Michael King, Quality Learning Australia - Cease dependence on inspection to achieve quality

This is one of Deming's ideas that we've found people struggle to understand.



Rather than rely upon inspection of product and service as a means to achieve quality, Deming implores us to manage the processes that are responsible for delivering quality. These processes need to be identified and managed in such a way that they consistently and predictably deliver satisfactory results; those that are within acceptable limits of variation.

Yet, inspection is endemic in the prevailing system of management.

We have found this to be particularly true of the systems of management for schooling. Students are regularly subjected to inspection, which are called 'assessments'. They submit worksheets, projects and assignments, and they regularly complete tests. Assessments can be thus used to sum up the quality of students' learning. They can also be used to rate and rank the students. Such use of inspection does nothing to improve the quality of learning.

An examination of student assessment data reveals a large degree of variation. Some students do well; many do okay and some perform poorly. Schools (and schooling systems for that matter) consistently and predictably deliver results that are not acceptable: students performing poorly.

A preferred response to the growing realisation of system incapability has been to increase dependence upon inspection: more national and state tests, more frequently.

In our work with schools and school systems, we encourage them to focus upon the systems and processes of learning. Importantly, we help educators and students focus upon the specifics of what students need to know, understand and be able to do. Students learn to track their own learning progress, reflect on how they learn best and support their teachers to provide the most effective teaching possible. These are the processes that deliver the outcome: the learning processes.

## Wise words from the Master



I am reasonably comfortable with my ability to write coherently. Comfort turns to discomfort very quickly in two situations. Situation 1 - whenever what I have written is likely to be read by Ivor (a number of readers are now trembling ever so slightly at the thought). Situation 2 - whenever I write anything about Dr Deming and it is likely to be read by Henry Neave. Nevertheless, for the 2014 Points, I have bitten that particular bullet and also asked Henry for his thoughts. For those who might not be familiar with Henry's work, he worked closely with Dr Deming in the UK for many years, is the author of *The Deming Dimension*, founded the late lamented British Deming Association and is an all-round nice guy. Henry, despite claiming retirement, has recently been working on *12 Days to Deming* and replied as follows. RC

Regarding your 14 Points project, I've decided to offer you much more than you need, for you to do with whatever you like! It is an extract from the current draft of Day 7 of the 12. That Day is entitled **TARGETS, APPRAISALS, PERFORMANCE INDICATORS, QUOTAS, SPECIFICATIONS, PAY FOR PERFORMANCE, FINANCIAL INCENTIVES, LEAGUE-TABLES AND OTHER OBSTACLES** - so rather relevant to Point 11 in particular. Early on in that Day's reading I wrote up eight true stories. I then had the bright idea of asking my volunteer readers if they had any stories they would like to contribute. That idea produced not just eight more stories but eight more pages of stories! And that is what I have sent you.

As regards (in effect) the Deming philosophy as a system, of course you are right. However, in the first three or four four-day seminars which I attended or assisted at, he was still largely discussing the Points individually rather than concentrating on the interlinks. One of the unique features of Dr D's work is that the individual pieces of the jigsaw are well worth study, not just the picture when the jigsaw is put together. Of course, when it gets to that stage, the importance and relevance of all the individual pieces becomes even more obvious.

Finally, you asked for a photo. I attach one of 'him and me' taken at a BDA conference.

I hope at least some of this is useful.

*Henry*

*Selecting which story or stories to reproduce I am afraid defeated me. Staring at a blank screen, I had a bright idea. And so, you can find all eight pages on-line at [www.theuic.com/2014points](http://www.theuic.com/2014points). If you'd like to play, send me your contribution (and a photo) and we'll add them. RC*

# 50 years of Managerial Breakthrough



What happened in 1964? With apologies to our younger readers - the Beatles are no. 1 in the U.S. charts, plans to build the New York World Trade Center are announced, Cuba cuts off the normal water supply to the United States Guantanamo Bay Naval Base in reprisal for the U.S. seizure of four Cuban fishing boats off the coast of Florida, the first double-deck carriages begin trial runs in Sydney, the average weekly wage in the UK is £16, Cassius Clay beats Sonny Liston and is crowned the heavyweight champion of the world, the British and French governments agree a deal for the construction of a Channel Tunnel - expected to take 5 years to build, the first Ford Mustang rolls off the assembly line, Richard Burton and Elizabeth Taylor marry, the Rolling Stones release their debut album, Nelson Mandela makes his "I Am Prepared to Die" speech at the opening of the Rivonia Trial, the first program written in BASIC is run, in July the U.S. sends 5000 more military advisers to South Vietnam bringing the total number of United States forces in Vietnam to 21000, Holland was represented by Anneke Grönloh with the song "Jij bent mijn leven" at the 1964 Eurovision Song Contest, the first edition of The Australian is published in Canberra - it is Australia's first national daily newspaper, published by Rupert Murdoch's News Limited, the Forth Road Bridge opens over the Firth of Forth, *Goldfinger* opens in London, Malta obtains independence from the UK, the first section of the Shinkansen high speed railway between Tokyo and Osaka is inaugurated, Dr Martin Luther King Jr. receives the Nobel Peace Prize, Nikita Khrushchev is deposed as leader of the Soviet Union, the Labour Party wins the parliamentary elections in the UK ending 13 years of Conservative Party rule - the new Prime Minister is Harold Wilson, The House of Commons votes to abolish the death penalty for murder in Britain, The

Queensland government declares a State of Emergency in an attempt to end the Mount Isa Mines dispute, Nicolas Cage, Bridget Fonda, Sarah Palin, Bret Easton Ellis, Russell Crowe, Courteney Cox, Ross Kemp and Harry Hill are born and *Managerial Breakthrough* by J.M. Juran was published.

This was a book 25 years ahead of its time and, just as we have seen with Deming's 14 Points, the lessons to be learned by reading it are as relevant in 2014 as they were back in 1964. The strapline on the front cover of the first edition reads: "A new concept of the manager's job and a systematic approach to improving management performance". The preface continues:

This new approach starts with the proposition that all managerial activity is directed either at:

- (a) *breaking through into new levels of performance, i.e. Breakthrough, alias creation of change, or alternatively,*
- (b) *holding the resulting gains, i.e. Control, alias prevention of change.*

In UIMPROVE language, projects and routine operation.

*Managerial Breakthrough* is a must read for any manager serious about their job.

Juran starts chapter 1 with the importance of control. "Control means staying on course, adherence to standard, prevention of change. Under complete control, nothing would change - we would be in a static, quiescent world". This is, at first glance, an odd way to start a book about improvement. He goes on: "This isn't as bad as it sounds. For a good many things, it would be wonderful to have no change". On page 2, Juran introduces the concept of breakthrough: "Breakthrough means change, a dynamic, decisive movement to new, higher levels of performance". On page 4 comes the punch line:

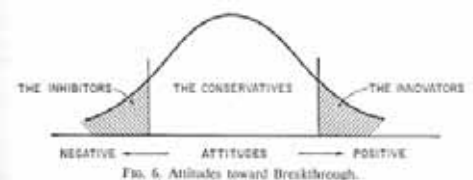
"The manager must do both. All managerial effort is aimed at either Breakthrough or Control. Managers are busy doing both of these things and nothing else". And this is why the definition of 'routine operation' and 'projects' feature early in UIC courses.

And so on to Annual Planning. On page 21 Juran describes "a well-known New Jersey company": "Breakthrough is not only stated policy at the top; the entire system of setting objectives, and of planning to meet them, provides for Breakthroughs. In preparing the annual plan and associated budget, each manager, without exception (clear down to the first-line supervisor on the factory floor) is required to include a budgeted improvement. This is not done by writing down a percentage; it must be based on a statement of what needs to be done, what improvement projects will be tackled, and how these projects will be worked out. The management is not satisfied with a promissory note - it asks for, and receives, a pledge of specific actions".

That takes us up to page 21 and there are nearly 400 pages in *Managerial Breakthrough*. Other highlights for me are the chapter on Pareto Principle and "The Spectrum of Personal Attitudes", now common currency amongst 'change people'.

My recommendation to you? Get on-line now and order yourself a copy. I prefer the original 1964 edition.

*Richard*





# Facilitator pages

Facilitators bring UIMPROVE to life in their organisations. Not only do they have a vital role to play in helping with projects and meetings, they are also the guardians of the approach. In this section, we review the 2013 Facilitators Conference and hear a few experiences of facilitation.

- 7th Annual UIMPROVE Facilitators Conference
- Conference reflections
- Forget the Yellow Brick Road, it's time to follow The Manual
- A journey with UIMPROVE
- Get UICed
- Customer Service Standards Project Kick-Start
- Increasing our pool of Facilitators

# 7th Annual UIMPROVE Facilitators Conference







01



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09

The 7th Annual UIMPROVE Facilitators Conference was held on 13-14 May 2013 in Sheffield. As usual, we had a fantastic variety of speakers. See for yourself - videos of each speaker are on-line at [www.theuic.com/FacConf7](http://www.theuic.com/FacConf7).

We welcomed back Andrew Forrest, Chief Executive of Great Yarmouth Community Trust as our Keynote Speaker. Andrew explained how UIMPROVE has helped Great Yarmouth Community Trust survive, grow and realign its portfolio of services in difficult economic times with help from Deming, Juran, Tribus, Ishikawa and Shewhart.

Andrew's message for Facilitators: "You are all guardians of the business of change and of the Key Concepts to make real and profound change in your organisation".

Andrew was followed by colleague Lynn Temple, Facilitator and Improvement Coordinator for Great Yarmouth Community Trust who explained how she has developed the role of Improvement Coordinator and also how being trained as a Facilitator has improved her own confidence. Lynn took us through the lessons she learned having facilitated Corporate Annual Planning for the Executive Team.

- 
- 01 THE REGENDA GROUP
  - 02 SOUTH YORKSHIRE HOUSING ASSOCIATION
  - 03 GREAT YARMOUTH COMMUNITY TRUST
  - 04 SOUTH BIRMINGHAM COMMUNITY HEALTHCARE NHS TRUST
  - 05 JANE, DENISE, RAB AND LORRAINE
  - 06 CITY SOUTH MANCHESTER HOUSING TRUST
  - 07 WEAVER VALE HOUSING TRUST
  - 08 THE WINNING QUIZ TEAM
  - 09 Q&A PANEL
-



01

The Most Heroic Journey Award for the conference goes to Danny Cepok from Fife Council who, with some tough diary commitments travelled down from Fife, presented and then went straight back. Thanks Danny! Danny's story about the regeneration of Kirkcaldy's town centre is told elsewhere in the Yearbook - if you liked reading about it, watch the video.

Next up were Joanne Cartwright and Julia Brinsdon from Birmingham Community Healthcare NHS Trust with a Presentation entitled 'From Kick-Start to Culture'. This looked at how the 'low-level' use of tools and techniques can assist with culture change at an organisational level.



02

The TV show 'Loose Women' came to the conference when Stephanie Harrison, Julie Vincent, Kellie Darracott and Tracy Walker from The Regenda Group took to the stage. It is impossible to do justice to this session in writing so watch the video.

01 LYNN AND ANDREW  
02 JOANNE AND JULIA  
03 JULIE, STEPH, KELLIE AND TRACY  
04 SHARRON, JAMES AND CLAIRE



03

Close second to Danny for The Most Heroic Journey Award was Jane Kovacs of Quality Learning Australia. Fresh off the plane from Australia, Jane's Presentation 'Improving Learning and Learning how to Improve' shared ways that schoolchildren and teachers can improve education with the help of Deming's philosophy. She enlightened us with how an 8 year old can produce Deployment Flowcharts and Ishikawa Diagrams with ease.

We finished the conference with a triple act from Sharron Dyett, Claire Matthews and James Highmore from South Yorkshire Housing Association who explained how they had trained a new intake of graduates and how they had given them some high profile projects to cut their teeth on with exceptional results.



04

The 8th Annual UIMPROVE Facilitators Conference will be held in Sheffield on 12-13 May 2014. We have seen organisations take different approaches to who they send and observed that the following mixture is ideal with a minimum of three and a maximum of six participants:

- (1) *The Chief Executive or a Director (someone different each year)*
- (2) *The Facilitator Coordinator (should attend every year)*
- (3) *A minimum of one and a maximum of four Facilitators (one novice, one experienced, one who has attended the conference before, one who hasn't)*
- (4) *Recently appointed senior managers who need to better understand UIMPROVE*



# Conference reflections

We felt very privileged to be asked to share our experiences and ideas at the Facilitator Conference in Sheffield this year. Our first experience of the UIC had been a highlight of attending the Deming Research Conference in New York in 2011 where we met up with Lisa and Richard. It is always wonderful to connect with people who share your passion for organisational improvement; particularly those who base their efforts on the work of W. Edwards Deming. Our focus in applying Deming's philosophy and methods over the last 15 years has been through supporting the improvement efforts of the school education system in Australia. Our approach and methods, as you would expect, have much in common with the UIC.

It was a delight to be able to share our experiences and thinking with such a warm, receptive audience. The Facilitators Conference provides a great space to spend time with like-minded people with similar purposes. To have your efforts acknowledged and celebrated, and to learn from others whose work, and challenges, are similar to your own is extremely valuable. The conference provides an affirming and energising booster shot - which is so important from time to time - improvement work can be tough going! There is the potential for everyone to learn; as different needs reflecting different stages of the improvement learning journey are catered for through the sharing sessions and the diversity of participants.

I particularly enjoyed the Great Yarmouth Community Trust presentation - such important and deeply moving work, greatly supported by the UIC approach. I was really impressed and learned much from their embracing of the use of data and Control Charts (we find most people have taken a vow of statistical abstinence that is difficult to overcome). Also the Scottish town of Kirkcaldy, and their tale of a remarkable town transformation - and the power of the wee sticky note. We too have yet to find a better improvement 'technology'.

The social side of the conference was great fun too. Thanks so much UIC. I am going to try really hard to attend in 2014. (But just in case I don't make it, I hope the videos of the presenters will be on your website again?!)

*Dr Jane Kovacs  
Quality Learning Australia*

# Forget the Yellow Brick Road, it's time to follow The Manual

My first experience of the UIC was as an attendee at the Facilitators Conference in May 2013 where, as well as learning 'it's more than just post-its', one of the main messages was to 'follow the manual'.

The manual would supposedly teach me how to kick-start projects, provide clear processes and of course show me how to write in a Notebook. All, but how to conquer the world it appeared. At this point I had not been trained as a Facilitator so, a week later on my first day of training, I could not wait to get my hands on 'the manual' and, when Denise and Josie handed it to me, it was everything I expected it to be.

As well as meeting some great people and learning all about the world of social housing from my other team members, I was able to discuss ideas for my first Project Kick-Start during one of the activities. Working part time for an Autism Charity alongside my NHS work, I had run a group for young people with autism for over 3 years and I wanted to branch out into an older social group for individuals aged 16-25. Despite being an area they have never looked at before, by following the process of putting together a Kick-Start, everyone inputted into how I should run the session and what questions I needed to ask. I was then able to take the questions to the charity committee and start to put the plan into action. In between the 2nd and 3rd modules of the Facilitator Development Programme, I ran the Kick-Start with young people and their parents. Following the planned agenda there was a short introduction from the Branch Officer to start and then we went straight into the Cocktail Party with the questions we had

decided as a group. Parents and young adults with autism were actively participating and putting down their ideas. The Cocktail Party method ensured that everyone was able to have their say and put as many or as few ideas down as they wanted. There was no pressure as individuals were able to go around in their own time. During the break I clustered the post-its and after tea and biscuits I summarised the main points and ideas to the group and informed everyone of the next action. It showed me that the methods the UIC use, not only work with adults in the work environment but with young people with autism, which includes individuals with varying levels of communication and behavioural difficulties.

Once you start using these methods it leaves you wanting more. The UIC has not only made me more organised (with nearly all my correctly positioned actions either completed or set into routine operation) but has helped me to support others and I find myself facilitating and bringing a meeting back on track whether I am set Facilitator or not. I am now a true UIC follower with my very own manual and I am leaving a trail of processes behind me.

*Sarah Binks*  
*Lead Speech and Language Therapy*  
*Assistant, Adults with Learning Disabilities*  
*Birmingham Community Healthcare*  
*NHS Trust*





# A journey with UIMPROVE

THE GREAT YARMOUTH COMMUNITY TRUST FACILITATORS

After being entrusted with the role of Improvement Coordinator with responsibility for the Facilitators at Great Yarmouth Community Trust, Lynn Temple's involvement with UIMPROVE has grown and become a big part of her working life. This has been a journey for Lynn and we invited her to the Facilitators Conference to talk about her experiences along the way.

The 7th Annual UIMPROVE Facilitators Conference - Natalie, Sam and myself were looking forward to our first Facilitators Conference, although I must be honest and say that, as I'd been invited to say a few words, I felt more than a little trepidation and my stomach was literally in my boots. It had seemed a good idea at the time but by the time we'd met up and were standing on a freezing cold railway station at 07.30 in the morning I was definitely having second thoughts.

Luckily we were accompanied by our CEO Andrew Forrest who had been invited along as Keynote Speaker to give an update on events at the Trust. Andrew has the wonderful ability of being able to motivate you with a mere glance and by the time it was my turn to go on I had more or less stopped shaking.

The essence of my talk was about becoming first a Facilitator then Improvement Coordinator for the Trust and the confidence building journey which had resulted from this, much to my surprise, to which I owed tremendous thanks to

Andrew, The Universal Improvement Company, their staff and the wonderful UIMPROVE manual.

You can check out the UIC website to see the actual content of my talk and I marvel at this because I can't quite believe it's actually me!

To anyone hovering on the brink of deciding whether to undertake facilitation training or not I would say with wholehearted enthusiasm to GO FOR IT! You won't regret it and it can, as in my case, be life changing.

Our Facilitation Group celebrated our 1st birthday on 3 July 2013 and we all agreed we'd certainly come a long way from those early days of training. We held another celebration on the 20 September in honour of Sue, the last of our little group, who had at long last gained her Facilitation certificate. Sue caught up with a module she'd unfortunately missed at our initial training but said the training in Alsager was great and gave her the opportunity to learn alongside people from other organisations and agencies, which meant she learned not only facilitation skills, but also gained an insight into other areas of working in the community.

Our thanks again go out to Andrea who decided it was "time to get on a train" and come to see how we were getting on. Andrea joined our September Facilitation Group Meeting and was able to pass on some very welcome hints and tips. As an

organisation we were at full stretch which meant the Facilitation Group could only be called upon to facilitate Trust-wide improvement projects. However, on a positive note, this was a marvellous opportunity for everyone else who had undertaken UIS training to hone their skills and I'm pleased to report that, following a suggestion by Andrea, I have advised the staff that we can be called upon as consultants, helping colleagues to put structure to a topic and suggesting appropriate tools and techniques. I'm sure we all know from personal experience that it can be a little daunting planning an event, or running a meeting, especially for those more recently trained.

Lastly, this final point is so important and, as it was also heavily emphasised by Andrea, I would like to share it with you all. It is vital to continually review meetings, events, projects etc. because if you don't discuss what didn't work or go well or what should be changed for next time then you cannot hope to improve and we aren't going to let that happen are we?!

*Lynn Temple  
Improvement Coordinator  
Great Yarmouth Community Trust*

LYNN 'ON STAGE'  
AT THE FACILITATORS  
CONFERENCE





# Get UICed

Some readers may remember Ashley Bray from the 2013 Yearbook. He's certainly had a busy year. In addition to his day job, Ashley has taken on the role of Facilitator Network Coordinator for First Great Western, making sure that the 45 Facilitators are used to their full potential.

It has been 3 years since I embraced UIMPROVE. In that time I have facilitated many events and supported different parts of the business to drive change successfully. Looking back, what are the benefits of using the tools and techniques? Being able to prepare, be organised and be seen in other areas of the business has opened many doors and offered opportunity. If you want to succeed in your current role and drive your career and organisation forward then get UICed!

A Major Project I have worked on this year was developing a programme for engineering colleagues to integrate them with the rest of the business and give them the all important customer service skills. To do this we have teamed up with Flybe a regional airline and produced GIFT (Great Impressions First Training). So where do you start with a new relationship and a major project? Easy - The Complete Guide to Improvement, a Project Worksheet and lots of tea. Flybe welcomed the structure I brought to the meetings to efficiently work together and enjoyed the participation that using the UIMPROVE tools and techniques encouraged. I'm pleased to say that the programme has now touched over 800 colleagues so far - concept, through design and implementation using UIMPROVE.

The principles of what I've learned do not just stay in the office. I have offered support and structure to family and friends. A family member selling a house? Get the tools out. Family career questions? Get the tools out. A friend in need? Get the tools out. Sylv, Ali and Josie - you were right, they can be used anywhere.

Most recently I was asked to facilitate a meeting with First Great Western's Directors. When the request came through I thought 'that sounds scary'. Then I was told it would be in 4 days time and with 28 executive colleagues from First Great Western and Network Rail. In these circumstances there is only one thing to do - sit down, cuddle the manual and take deep breaths.

The night before at 18.00 the final details were e-mailed to me. Sitting on the hotel room floor, manual to my left, flipcharts, post-its and pens spread around, I began to put structure to the topic. The morning came, I set up, I did and I succeeded. Was I nervous? I thought I should be, but I was not. I have confidence in all the tools and techniques. So when I was stood up brainstorming, clustering and at times making interventions, I was in my element. The feedback from the event was very positive; one Managing Director said "today has been very successful and we have achieved a great amount".

Some of the lessons learned from this recent event are that weeks to plan ahead are great, but do not discount last minute facilitation requests. It does not matter who the audience is, trust in UIMPROVE and trust in your manual. You can plan anywhere - on a train, in a hotel bedroom, on a plane, platform or roadside. My last bit of advice relating to this is watch out for gusts of wind, whilst hundreds of floating post-its look pretty, you do look at bit daft chasing them and screaming out 'NNNNOOOOOOO'.

*Ashley Bray  
Specialist Services Development Manager/Operations Apprenticeship  
Senior Mentor  
First Great Western*

**First**  **Great Western**



ASHLEY BRAY (RIGHT)



# Customer Service Standards Project Kick-Start

Mike Smith attended the Facilitator Development Programme in 2012 and, when joining us, we don't think he was quite sure what he'd let himself in for. On attending Module 2 with no assignment to review he made a clear decision to up his game and make sure he had plenty to share on Module 3. Since then Mike has continued to actively seek out opportunity to facilitate for his colleagues.

At First Great Western we take pride in providing excellent Customer Service. Our Annual Planning (as always!) identified that there was still work to be done. We could further raise the quality and consistency of Customer Service Standards at every customer touch point. A project team was set up to revisit the standards and implement new ways of ensuring these standards are replicated in every customer facing role. There was also the requirement to measure the results.

I was working with fellow Facilitator Nikki Wilcox. Our first thoughts were that this would be a Major Project. Best get a meeting with the Project Leader and start planning. It was at this meeting that Nikki and I quickly established that this was a project to improve something which already exists and therefore Improvement Methodology should be used. The initial event would be a Project Kick-Start with 16 attendees, each from a different customer facing or customer service department. Next step: get out our copies of The Complete Guide to Improvement.

On the day we started with an introduction to the project from the Project Leader and a conference call from the Champion explaining the requirements of the project and the expected outcomes. This was followed by a Presentation around our

Mystery Shopper scores to give a bit of detail on what customers look for and how we as a business can affect that. We then ran a Cocktail Party with prompts around the room asking what sort of service customers expect, differences between existing roles and how they interact with customers and what sort of training staff get for customer service. We also sneaked one in about how customers interact with First Great Western as a business to try and highlight any areas that had not been thought of. This was finished off by creating actions from the answers to these prompts and a discussion on where to go next. Throughout the day we used the following tools: Round Robin, Briefing Sessions, Small Group Work, Cocktail Party and Clustering-by-Theme.

It was quickly established that there are many, many different ways in which a customer interacts with the business and to tackle all of these was a huge job. There were many actions to be completed, and amongst other things, these included reviewing existing standards documents, creating a 'quick view' version of these documents some of which are 100 pages long. We identified that we needed to look at improvements to training programmes or expansion of existing ones to areas which are not covered and creating a method for monitoring their effectiveness. The attendees were split into pairs and sent away to look at the existing standards documents that related to their areas of expertise and assess their suitability. They would then return at the next meeting to discuss the contents. None of the other actions could really be tackled until this had been completed.

The project is still ongoing - it is a long term thing to implement - and has met once more since the initial Kick-Start to discuss the contents of the existing standards documents. Nikki and I both enjoyed the event and when we had opportunity to review the day together we decided to identify what worked well. The room was a

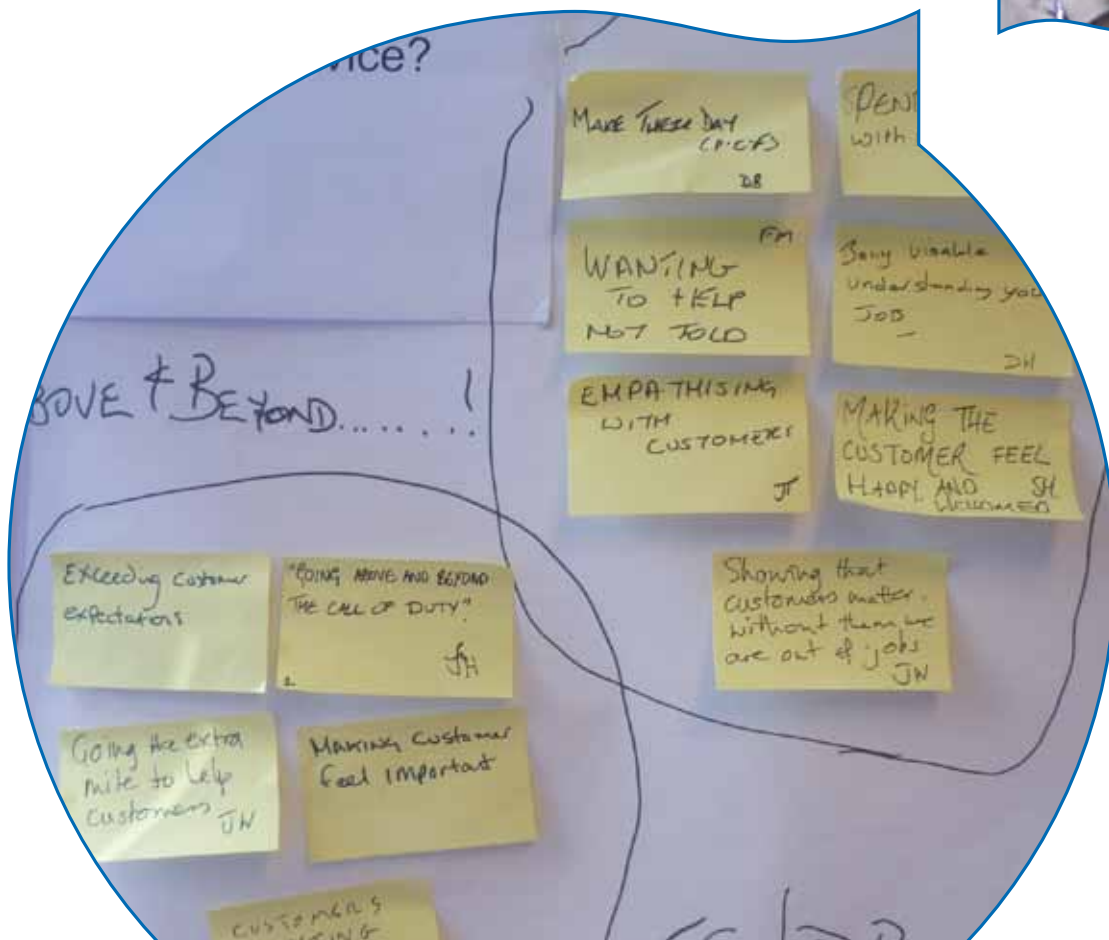
good size with enough wall space and lots of windows so very light. The attendees were keen to join in and recognised the need for the project. The tools and techniques we used were well received by all and people were pleased that we were able to achieve a list of actions and organise the next meeting on the same day. A nice touch was lunch which was very much appreciated and not expected by the group.

What didn't go so well for us was the Champion unable to attend. Their participation was by conference call. This was not very loud and difficult for all attendees to hear. Although lunch was well received by all, unfortunately it was served in the same room which was a distraction. Some of those joining us had travelled far and there were one or two late arrivals. This also meant that people were determined to finish on time. There was a lot to fit in on 1 day, for such a big project perhaps in the future we would plan more time to complete the Kick-Start, although good progress was made.

*Mike Smith  
Area Operations Manager - Reading  
First Great Western*



MIKE SMITH



# Increasing our pool of Facilitators

Facilitators are integral to the adoption of UIMPROVE. Over time the pool of Facilitators will become depleted through people changing roles, getting promoted and moving to pastures new. We encourage Facilitators to be chosen from right across an organisation to give a good mix of backgrounds. Weaver Vale Housing Trust has worked hard to get this right. In this article, Gary Hood explains where the organisation is currently and we hear from Facilitator James Whalley who is from an often overlooked group of staff.

Earlier this year we decided to increase the number of Facilitators that we had in the Trust. We'd been operating on 3-4 Facilitators for a number of years but decided that there was an opportunity to offer up this fantastic opportunity to staff and to ensure that we were resourced enough in the crucial facilitation role. We recognise the importance of this team and the impact it has on how we operate.

So, with the approval of our Exec Team, we trained seven new facilitators and also asked two original Facilitators to re-join the team. This resulted in us having a pool of 12 within the Trust. The team now comes from a diverse service background with representatives from all directorates which is great. This includes three trade staff who have taken this opportunity and is something completely different to their normal day job.

Here one of them, James Whalley, a joiner, provides his thoughts:

*The course gives you a unique set of tools that help you to solve problems, start new projects and help your employer to continuously improve their processes. You gain great personal confidence along with a sense of being a part of an amazing team that strive to assist your employer in moving forward. It also allows you to view your employer from a different perspective. You get great satisfaction from facilitating. Seeing a task from start to finish with a successful outcome is a huge achievement and gives you a great sense of pride when using your skills to continuously improve. The UIC course opens multiple doors when trying to progress in your career; helping you to gain knowledge of different areas of the business, facilitating for Chief Executives, Directors, Enterprise Managers and Team Leaders.*



We'd be lying if we said it was easy to make sure that everyone gets an equal opportunity to facilitate. Pam, one of our senior Facilitators, is acting in the coordinator role, which is proving successful and is helping us maintain a structure to work to so that we can be as effective as possible.

Two of the new Facilitators recently attended our Strategy Day in September and this gave them an insight into corporate level working between the Exec Team and the next level down - the Enterprise Managers. This will serve them well as we enter our Annual Planning period.

Our current priority is to ensure that the Facilitator team supports the Leadership Team in the most effective way for Annual Planning. We're therefore agreeing both a consistent approach and message for all teams. This has been taken from the same Strategy Day back in September where our leader Steve Jennings, provided clarity and direction for us all to follow.

*Gary Hood*  
*Service Improvement Manager*  
*Weaver Vale Housing Trust*



STEVE JENNINGS AND NEWLY TRAINED FACILITATORS

# Final word

We have printed 3500 Yearbooks this year. These are distributed to existing and past clients along with a wide variety of people with an interest in organisational improvement. Our postage bill is always high - this Yearbook will have been sent out from Derbyshire across the globe - Canada, the US, Ireland, Holland, Belgium, Germany, Singapore, Australia and New Zealand. We also give a copy out to everyone who attends one of our courses during the year.

We generally pester a select few to get a good range of contributions each year but we are always delighted to receive contributions from anyone who has anything they think would be of interest to other people interested in improvement. The contents of your article should either reinforce something someone has learned, provide practical tips or some new learning or challenge conventional thinking.

Potential authors should be aware that our mailing list includes a couple of great friends of Dr Deming - Henry Neave, author of *The Deming Dimension* and Don Wheeler, author of far too many books to mention and, in our view (and the view of many others), the world's greatest working statistician (we had to word that one carefully Henry).

Our clients also include a number of the world's greatest working and 'retired' pedants who like to get their apostrophe's in the right place (for the avoidance of doubt, that one's a joke).

Please send your contributions, both written and photographic, to your favourite UIC consultant or direct to me. Although space sometimes thwarts us, we aim to publish everything received.

*Richard*

# Dates for your diary - public courses

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. The courses in Maastricht are conducted in English and Maastricht is easy to get to from all over Europe.

Occasionally we have to change dates as the diary evolves - check the website ([www.theuic.com/publiccourses](http://www.theuic.com/publiccourses)) for the current picture.

## Universal Improvement Skills



Melbourne  
18-20 March 2014



Maastricht  
15-17 April 2014



Brisbane  
9-11 September 2014



Alsager, Cheshire  
7-9 October 2014



Maastricht  
11-13 November 2014

## Universal Leadership Skills



Maastricht  
3-5 June 2014



Alsager, Cheshire  
7-9 October 2014

## Facilitator Development Programme



Alsager, Cheshire  
Module 1: 29 April-1 May  
Module 2: 24-25 June  
Module 3: 15-16 July



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Company



Ivor says  
“keep improvement  
improving” so we will

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