

Identifying key challenges to organisational development and aligning this development with LSC priorities

Introduction

Self assessment has traditionally been seen solely as a means for preparing for inspection. Few providers saw it as a tool to identify areas for improvement and development and therefore as a means of promoting self-improvement within their organisations, It was therefore perceived as an onerous duty to be undertaken solely for the benefit of external agencies rather than as a means of improving the experience and success rates of learners.

This view has changed, and increasingly providers perceive that holistic self-assessment benefits the learner and the staff and is therefore essential to the well-being of a provider's business and its capability to deliver effectively to its stakeholders. It is now seen that self-assessment is central to organisational development and success, though some providers are still seeking out the best way of ensuring it.

In addition, owing to the ever greater emphasis on regionalisation, providers are now being encouraged to view their organisational development in terms of the regional context within which they find themselves, and more specifically in terms of how they help the regional LSC address its own priorities.

In this highly innovative project, three providers were brought together in a systematic attempt to develop good practice in these two separate, but interrelated area. The project participants agreed the following aims:

- § To identify key challenges facing their organisations
- § To establish developmental priorities shared by staff at all levels
- § To familiarise staff with the LSC's *Agenda for Change* and raise awareness of the need to align organisational priorities with the regional LSC's *Annual Statement of Priorities*.

The aims were to be achieved via the following objectives. The project participants would put in place strategies to:

- § Identify six key challenges within their individual organisations
- § Identify any barriers to change necessary to address those challenges
- § Ascertain whether moves to address the challenges were having a positive or negative effect on the individual provider's self-assessment and development plans.
- § Link the organisations future development to LSC priorities.

Procedure and findings

The regional LSC representative identified three providers which he believed would benefit from collaborating on a project of this type. Interestingly, each of

the providers had different organisational needs as they were at different stages of organisational development. The three providers were:

- **Midland Group Training Services**, based in Coventry. MGTS had already made significant progress not only in terms of using self-assessment as a mechanism for identifying areas for improvement, but also as a means of increasing staff awareness of the role self-assessment played in promoting learner and business success. The following questions, used in staff training, indicate their advanced state of thinking in this area:
 - Who are we?
 - What is our market?
 - What do we need to do to ensure that self-assessment influences our development to both maintain our business and develop it?
- **Cannock Chase Technical College** had been recently inspected. The results of the inspection resulted in restructuring with a new management team put in place to take the organisation forward. This management team were looking to give their staff a new sense of purpose and vision.
- **TBG Learning** is a national private training provider. The Birmingham office had recently been subject to redundancies and restructuring. It joined the project in order to improve its approach to self-assessment.

In sum, the needs of all three project participants differed, yet at the same time it was felt that there was not only a great deal which they could learn from each other, but also, that collaborating on organisational development and linking this development to LSC priorities would benefit all three providers.

The first phase: designing and implementing ‘the Challenges Task’

At the first meeting, the providers discussed the self-assessment process and whether it was possible to develop a shared vision between staff and management about the future direction of an organisation. The question emerged as to whether or not the absence of shared vision meant that organisational development was being hindered owing to the views of staff being at odds with management planning. In order to explore the congruence (or not) between the views of staff and management, it was decided to seek the view of all staff concerned in terms of the key challenges facing them. The task proceeded as follows:

- each provider would ask three groups of staff, all at different levels, to complete the ‘Challenges Task’ anonymously; the three groups were:
 - managers
 - teaching/training staff (especially the disaffected/underperforming)
 - functional staff.
- Special effort was made to conduct the exercise so that it did not appear to be ‘yet another task connected with self-assessment, targets or inspection’

- All three groups at each of the providers were asked the following question:

Thinking about our college/training organisation as a whole, what do you think are the six most important challenges facing us. Try to use more than one word to describe these. Explain briefly why this challenge is important.

The plan was to then place individual, specific responses to the question into general themes. These themes would then be recorded on a grid, which sought to differentiate between the issues identified by the three different types of staff (for example, teaching staff might be expected to focus on different themes to those of management); **see table below**. In this way it would be possible to work out what each type of staff had chosen as the theme they were most preoccupied by or which theme was believed to represent the greatest challenge. The actual procedure used by the different providers are described below as are the findings.

Cannock Chase Technical College

- The representative from Cannock took the idea to the College's Senior Management Team, who agreed that the idea should be used as a cross-college activity.
- The SMT undertook the task individually, but the task was given to all other members of staff on a Staff Development day held in January. The day began with the Principal addressing staff on the LSC's *Agenda for change*. Staff in small groups were then asked to complete the task as individuals and discuss the outcomes as a group and come up with 6 priorities agreed on by all. The same exercise was repeated with part-time staff at a half-day event held later.
- The responses were then analysed in terms of themes and individual responses noted on the grid.
- The top six themes were then designated as the priorities that would be used to take the organisation forward.

Cannock were extremely pleased with the outcome of the task, which has revealed more of a shared vision than was anticipated. Staff found the task stimulating and thought the development day was effective. In particular, the college found that although the six priorities identified at the staff development day have been reflected in the college's Development Plan, staff attitudes after the task suggest that cultural shifts within organisations are not easy or automatic and more work needed to be done in this area.

The lessons learnt by this provider were as follows:

- § The Challenges task must not be seen as an end in itself
- § Staff need to know that their contribution to college priorities has been valued and is being acted on

- § Managers need to ensure that what staff have designated as priorities will also be reflected in changes to working practices in curriculum or functional areas.

TBG Learning

The task was completed rather hurriedly at TGB learning and initial analysis indicated a lack of shared vision across the three groups and a preoccupation with internal systems and processes (and losing sight of external pressures). This suggested that because the company was still recovering from recent redundancies, staff responses were conditioned by personal anxiety rather than focusing on future challenges. It was suggested that it might be better to bring staff together as a whole group, explain the purpose of the Challenges task and try the exercise again at some stage in the future.

Midland Group Training Services

The representative from Midland Group Training Services undertook the task in two phases:

1. A sample of 16 members of staff completed the task as individuals. This resulted in 40 key challenges. These were all listed on the analysis grid and the number of responses noted and added up. This highlighted six initial priorities.
2. All staff were given copies of the analysis grid and asked to complete the task again, by choosing what they considered to be the top 6 of the 40 key challenges. This was the first time they had seen other people's responses and the end result was that whilst 4 of the previous top six challenges remained the same, two of the other challenges emerged as significantly more important than those listed on the first grid.

The overall results of this first phase of the project were highly encouraging. Firstly, a suitable tool had been co-developed to move forward in terms of staff development, organisational development and the creation of a shared vision. Secondly, staff were being actively involved in establishing the direction the momentum the provider was taking. Thirdly, a medium of communication between staff and management had been created. This first step of the project then provided an ideal foundation from which to launch the second phase of the project, which was about increasing staff awareness of LSC priorities and finding ways to align organisational priorities with them.

Employees Most Important Challenges Facing The Organisation

No	Key Challenges	Managers					Teachers					Functional Staff					Total
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
1																	0
2																	0
3																	0
4																	0
5																	0
6																	0
7																	0
8																	0
9																	0
10																	0
11																	0
12																	0
13																	0
14																	0
15																	0
16																	0
17																	0
18																	0

NOTE: THIS GRID WHEN UP TO 40 ROWS

Second stage: Aligning Priorities

Although the initial outcomes of the project were interesting, it remained to be seen whether the Challenges task could be developed to be of further use. The project holders gave themselves a much more challenging task, the repercussions of which could be highly significant for the future development of their organisations.

While the Challenges Task meant that organisational priorities had been made clear to all involved, there potentially remained a gap between those priorities and those of the LSC. The task was to determine the extent of this gap – a large gap suggested that much more work was needed to ensure a greater alignment of priorities. The providers therefore set themselves the following objective: to ascertain how the priorities identified fitted in with the LSC's *Annual Statement of Priorities*.

The process started with the LSN consultant appointed to oversee the project, developing a new grid based on the LSC *Annual statement of priorities* (see below). The participating providers then sought to match the responses from the Challenges task (i.e. the responses of the managers, teaching staff and functional staff) against this grid in order to see where there was agreement and where there were gaps.

No.	New Measures Of Success	Key Challenges	Managers					Teaching Staff					Functional Staff					Total
			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
1	Ensure that all 14-19 year olds have access to high quality, relevant learning opportunities.																	0
2	Making learning truly demanded so that it better meets the needs of employers, young people and adults.																	0
3	Transforming the learning and skills sector through <i>agenda for change</i> .																	0
4	Strengthen the role of the LSC in economic development so that we provide the skills needed to help all individuals into jobs and lifelong employability.																	0
5	Improve the skills of the workers who are delivering public services																	0
6	Strengthen the capacity of the LSC to lead change nationally, regionally and locally.																	0

Cannock Chase Technical College

Owing to internal pressures emanating from the aforementioned reorganisation, Cannock determined to focus their efforts on the first stage of the project and did not participate in second stage developments.

TBG Learning

TBG Learning organised an open forum meeting to conduct the second Challenges task. Their findings were very encouraging and the positive outcome was a direct consequence of the first part of the project. This is because the Challenges Task played an important role in eliciting staff anxieties. The process acted as a catalyst to bring these anxieties out to the fore and the subsequent restructuring had allayed staff anxieties markedly, leaving them more able to concentrate on thinking about organisational priorities. As a result, staff felt comfortable with sharing their concerns about the company and its direction and were therefore able to directly contribute to the formulation of six shared organisational priorities. This meant that the organisation had a powerful insight into the extent to which there were shared priorities across the organisation. Once the company representative on the project had matched these against the second analysis grid based on the LSC's *Annual Statement of Priorities* it was possible to get a very clear idea as to the extent to which the organisations priorities align with those of the LSC. The direct consequence of the process has been very productive and constructive: the company is now developing a mini-SAR based on the summary of the *Annual Statement* on the analysis grid.

Midland Group Training Services

Of the three providers, Midland Group Training Services had a distinct advantage when carrying out the Challenges task. The company had already undertaken a strategic review of its priorities and its participation in the project led to the anticipated outcomes. In particular, the outcomes of the task demonstrated close agreement between all members of staff (much more so than was the case with other providers) and this agreement was found to align closely with those found in the *Annual Statement of Priorities*.

This provider also made the point that staff priorities will inevitably be partially coloured by individual roles within an organisation. Strategic managers will inevitably focus on the future direction of an organisation, whereas trainers and functional staff will be far more concerned with their experience as 'hands-on' deliverers. What was important, however, was that everyone should be able to think of the organisation as '**our** business' rather than from a narrow personal perspective. Strategic thinking should inform both operational thinking and workplace practice so that all involved can carry forward a shared vision of priorities and where the organisation is going. The processes formulated through participating in the project promoted this kind of culture.

Lessons applicable to other providers

The providers involved in this quality improvement project believe that the project has achieved as much as was possible within its short timeline. They believe the Challenges task helped them gain a valuable insight into how their individual organisations work and has demonstrated a simple but practical way of identifying key priorities. The fact that these ‘internal’ priorities could then be matched against LSC priorities in order to facilitate dialogue with the LSC, something which will help determine future organisational development and well-being, was a bonus with a long term consequence both for the providers and the funding body. It serves as an excellent model which could have national ramifications.

The following advice is offered to other providers who might wish to use the Challenges task in their own organisation:

- § In a large organisation, the task is probably best piloted with a small number of people rather than via a ‘big bang’ approach and getting everyone to do the Challenges task. This will encourage them to see the Challenges task as a key driver in helping the organisation to provide clarity and meaning to their own mission and strategic priorities.
- § The task appears to be well-suited to small providers or to specific curriculum areas within a larger organisation. This is because there are smaller numbers of people involved and consensus about priorities may be easier to reach.
- § By listing everyone’s concerns on the analysis grid, a truer picture of individual concerns within an organisation emerges. By presenting everyone’s views, individuals can then re-focus on designating common priorities.
- § Negative views matter. As well as determining the six priorities, grids reveal discord and anxieties. These can then be addressed.
- § ‘Following through’ and ensuring that priorities identified become the focus of future activities is important. Once common priorities have been established, they need to be worked on to become realities. Priorities have to be more than words on paper – they have to be real, owned and acted on.
- § Day-to-day pressures should not be allowed to stand in the way of developing a ‘shared vision’. A shared vision of where an organisation is going is likely to be preferable to a model imposed from outside.
- § It is likely to be mutually beneficial to both the provider and the LLSC to have unique, individual and real priorities that reflect the ability of the provider to identify key issues accurately and how they meet those of the LLSC.
- § Providers need to understand the implications of the LSC view of ‘holistic’ assessment. This may make them see the Challenges task in a more favourable light.