

EQUABENCH—Benchmarking European Excellence

Leadership and Constancy of Purpose Innovative Practice Guide



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Introduction

In October 2008, the EQUABENCH project brought together eight vocational, education and training (VET) organisations with a proven track record in innovation and continuous improvement. Partner organisations from Italy, Slovenia, Northern Ireland, Ireland, Belgium, Germany, Portugal and the Netherlands followed a two year work programme to share expertise and best business practice at workshops, benchmarking activities and dissemination events.

This Innovative Practice Guide was produced by the EQUABENCH network as part of a Leonardo da Vinci funded project running from 2008 to 2010. This Guide explores the innovative practice used by a number of Vocational Education and Training (VET) organisations from across Europe in relation to the EFQM Fundamental Concept of Excellence – Leadership and Constancy of Purpose.

Titles in the series are:

- Leadership and Constancy of Purpose
- Management by Processes and Facts
- People Development and Involvement
- Customer Focus
- Results Orientation
- Continuous Learning, Innovation and Improvement

These guides consist of:

1. An overview of the practical steps that VET organisations should apply to assist in the development of innovative practice.
2. An Appendix of detailed case studies from the participating VET organisations which have informed the Innovative Practice Guides.

Guides are freely available for download from partner websites and from the following sources:

<http://equabench.epr.eu>
www.adam-europe.eu/adam/homepage

Leadership and Constancy of Purpose - The EFQM Fundamental Concept

The Concept

Excellence is visionary and inspirational leadership, coupled with constancy of purpose.

How the Concept is put into Practice

Excellent organisations have leaders who set and communicate a clear direction for their organisation. In doing so they unite and motivate other leaders to inspire their people. They establish values, ethics, culture and a governance structure for the organisation that provides a unique identity and attractiveness to stakeholders.

Leaders at all levels within these organisations constantly drive and inspire others towards excellence and in doing so display both role model behaviour and performance. They lead by example, recognising their stakeholders and working with them on joint improvement activity. During times of turbulence they display a constancy of purpose and steadiness that inspires the confidence and commitment of stakeholders. At the same time they demonstrate the capability to adapt and realign the direction of their organisation in the light of a fast moving and constantly changing external environment, and in so doing carry their people with them.

The Benefits

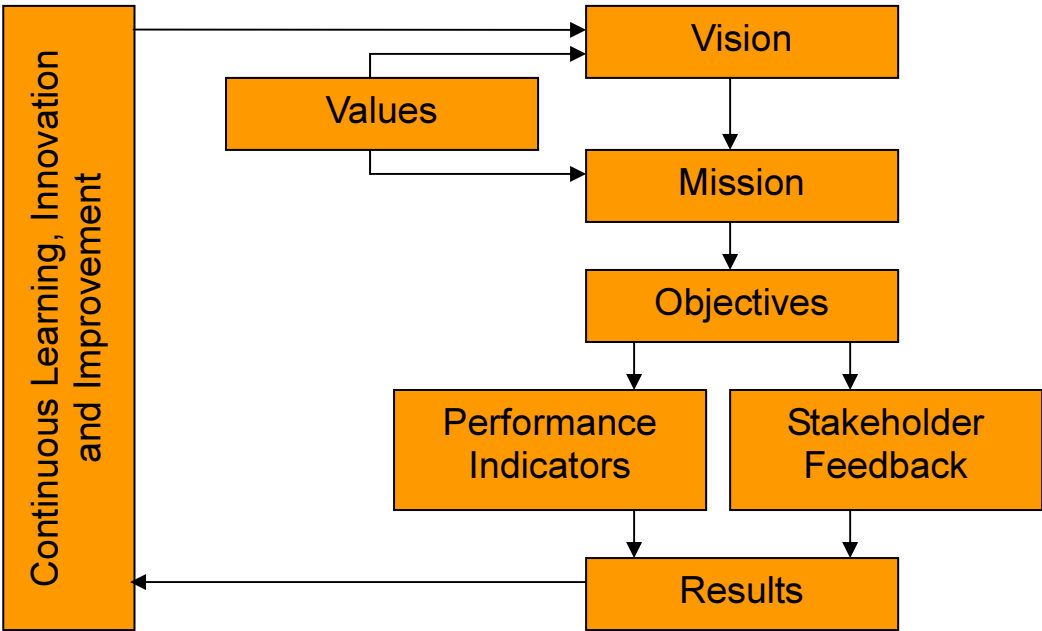
- Clarity of purpose and direction within the organisation
- A clear identity for, and within the organisation
- A shared set of values and ethics
- Consistent and role model behaviours throughout the organisation
- A committed, motivated and effective workforce
- Confidence in and within the organisation, even in turbulent and changing times

The Practical Steps

The application of key aspects of the EFQM Fundamental Concept of Excellence within VET organisations is explored by the case studies included in the appendix of the Equabench Innovative Practice Guides. While these highlight a variety of innovative approaches and techniques relating to each Fundamental Concept there are common practical steps that must be applied by any organisation seeking to improve any part of their business.

Each of the Guides in this series structures information and advice for VET organisations against these steps in relation to the Fundamental Concept under consideration.

The steps have been designed to assist VET organisations to better apply the principles of the EFQM continuous improvement cycle to their context as is illustrated below.



Practical Steps to Providing Effective Leadership and Constancy of Purpose

Vision and Values

The EFQM Excellence Model establishes that excellent organisations have leaders who set and communicate a clear direction for the organisation. This requires leaders of the organisation to establish a Vision which is an aspirational statement of what the organisation wants to achieve. This Vision should be shared by staff and the organisation as a whole. It is also important to identify and verbalise the Values which underpin everything the organisation is trying to achieve and how it will behave in pursuit of its Vision. Values exist in every workplace and are visible through actions not words and form the foundation of everything that happens within the organisation.

Development of the Vision and Values requires leadership from senior members of the organisation and consultation with key stakeholders e.g. VET beneficiaries. The Vision and Values, once established should be subject to ongoing scrutiny and review. The application of sound practice by leaders in developing a Vision and Values is central to achieving constancy of purpose.

Of the Equabench partners, CRPG employed a particularly innovative approach to designing and embedding their Vision and Values. The approach could be easily replicated and applied by any other VET organisation. Core to the approach was proactive and facilitated engagement with all stakeholders and implementation of a well planned process which included:

- Step 1 Diagnosis
- Step 2 Management discussion and alignment
- Step 3 Organisation discussion and alignment
- Task 1 Development of Value Statements
- Task 2 Development of Promises of Value with corresponding behaviour descriptions.

A very macro (organisational) perspective of leaders' role in developing Vision and Values has been examined thus far; but the same principles can be applied by VET leaders at a more micro (project) level.

For example, Cedar's and Josefsheim's Change Management projects both commenced with each organisation having a clear Vision or clarity of purpose on what their project was to achieve at the very outset. Cedar set out to establish a Brain Injury Service to meet the needs of the increasing numbers of people surviving brain injury in a region where there was a dearth of services outside of acute care. Josefsheim's project envisaged a 'win:win' outcome for a new way of working whereby disabled

people were included in a mainstream workplace in a commercially advantageous arrangement with a major local employer.

Mission

From a leadership perspective, once an organisation's Vision and Values are clear, it is vital to thoroughly plan and articulate how this Vision will be progressed within the context of the organisation's culture and ethics as defined by the Values.

An organisation's Mission is a statement of purpose or intent which clarifies what the organisation will do in order to advance the Vision. The Mission should be developed in a group setting by the entire organisation or in the case of a larger organisation by their senior management team. In all cases top management involvement is essential to ensure the working group's mandate and authority. This said consultation with all stakeholders is also vital. Appropriate stakeholder engagement can be through direct contact or through market research.

A Mission statement should provide a very brief, high level summary of the organisation's purpose that is easily communicated within and without the organisation. This should be backed by a sound strategy prioritising the major concerns and interests for a specific period. Since an organisation's Mission is so closely allied to strategy it is more likely to require review than the Vision.

This leadership role is not confined to high level organisational Mission statements. Deciding on the approach to be taken is an essential task for the leaders of any project. For example, Pluryn used consultant facilitated dialogue sessions with executives, directors, managers and employees to determine their approach to leadership development resulting in the Discovery of Leadership programme.

Sound leadership in determination of the Mission or approach ensures clarity of purpose and direction within the organisation.

Objectives

Vision, Value and Mission statements allow leaders to set and communicate a clear direction for the organisation and projects within an organisation. Yet these statements fall short in detail and it is essential that leaders provide clear statements of intent which show what must be achieved in order to realise the overarching Mission thereby advancing the Vision.

Objectives, aims and goals are often used interchangeably by organisations and many definitions seek to describe the subtleties between each term. For VET leaders the

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semantic issues are arguably less important than ensuring that the organisation or project in hand has clear parameters for implementation.

Objectives should provide a summary of what tasks need to be completed to achieve the Mission or agreed approach. Ideally they should be SMART: Specific, Measurable, Achievable, Realistic and Time-bounded.

Objectives allow leaders to maintain a constancy of purpose at an organisational level e.g. Cedar's Organisational Balanced Scorecard objectives provide a high level summary of the tasks in hand for the whole organisation for 1 year. They also provide clear direction at a project level, e.g. Josefsheim's business and strategic objectives for their inclusive work opportunities project and Pluryn's programme goals for the Discovery of Leadership programme.

Performance Indicators and Stakeholder Feedback

Common to the success of all the innovative practice described in the Appendix is the valid investment made by each of the organisations' leaders in assessment and review. Central to this is the applied rigor of Performance Indicators and Stakeholder Feedback.

Performance Indicators

These are measurable indicators of performance or a stepping stone to be used along an agreed pathway that will show leaders if the organisation is making progress towards achieving its objectives. Performance Indicators should be closely aligned to objectives and may in effect provide the 'measurable' element of the SMART acronym. Leaders need to establish both qualitative and quantitative Performance Indicators to capture what has been accomplished by the organisation and demonstrate compliance with organisational Values.

In designing Performance Indicators VET leaders need to ensure that they are measuring results that are important in showing how the organisation is functioning and not just results that are easy to access. So, Performance Indicators should accurately reflect whether progress is actually being made and not simply record readily available data which is not meaningful to performance.

It is insufficient however, for leaders to set Performance Indicators without defining a mechanism for their timely review. Cedar identifies 'Performance Below Target' as one of their key drivers for change and NLN describes the monthly review of progress in the Key Performance Results process.

Performance Indicators allow Leaders to:

- Communicate direction and requirements more effectively;
- Contribute to clarity of purpose; and
- Inspire confidence in and within the organisation, even in challenging times.

For example, NLN reported that the development and deployment of Key Performance Indicators enhanced the role of leadership within the organisation. The process provided a clear focus on what was to be achieved and provided a mechanism to define internal and external targets. It also allowed targets to be aligned with the organisation's Mission and Values and with its strategic plan.

Stakeholder Feedback

Leadership engagement with stakeholders is central to the EFQM Excellence model and is particularly pertinent to the VET sector. VET organisations face the challenge of working with and meeting the needs of a disparate group of stakeholders. These include employers, training providers, funders, statutory partners and trainees who are often people who are disadvantaged and who bring another raft of professionals and carers as additional stakeholders.

The Fundamental Concept of Excellence exhorts leaders to lead by example, recognising their stakeholders and working with them. Such engagement allows leaders to ensure that the Vision, Values, Mission, Objectives, Performance Indicators and Results are person centred and customer focused. A fundamental responsibility of any leader is to ensure that their stakeholder and customer needs are being met and measured.

A wide range of mechanisms are at the disposal of VET leaders to ensure effective stakeholder engagement. For example:

- CPRG engaged its management team and staff through individual interviews, focus groups, group tasks, workshops and outdoor events to develop and disseminate their Values and Promises of Values. Communication with a wider group of stakeholders was then taken forward through an internal newsletter, posters and the intranet.
- Cedar cites ongoing engagement and communication with stakeholders, including people with brain injury and the health and social care professionals working with them as key to the preparatory market research and assessment of need for the development of their Brain Injury Service.
- Each of the case study organisations use surveys with their client groups to assess results against targets and to provide qualitative data to improve the future delivery of those services.

Results

Leaders must ensure that qualitative and quantitative Results are collated using robust mechanisms to determine whether the performance indicators described above have been achieved. Results must then be analysed to assess whether the intervention has successfully impacted on the client group.

Leaders within VET organisations will need to consider a range of Results in order to drive and inspire others towards excellence and to be equipped to adapt and realign the direction of their organisation in light of the dynamic nature of the VET environment. In terms of depth, VET leaders must consider both: organisational (aggregated) Results which determine the organisation's performance as a whole; and segmented Results which allow analysis of the performance of a particular project or location. In terms of breadth, the EFQM Excellence model prescribes that leaders should consider Results relating to Key Performance Outcomes, Customers and Stakeholders, Staff and Volunteers and wider Society.

It is vital that leaders ensure that the mechanisms used to collect and collate Results are fit for purpose and appropriate to the range of measures being used. For example:

- Cedar commissioned an external evaluation of their newly developed Brain Injury Service to analyse the results and impacts of this specific project.
- NLN collates and analyses quantitative data in all operational areas where targets have been set. This is carried out through: a customised database recording occupancy and trainee outcomes; a computerised accounts system; and a human resource database. NLN also reviews qualitative data collected through internal and external surveys to record service user satisfaction and experience and staff engagement.

Continuous Learning, Innovation and Improvement

Leaders should be the principle drivers of improvement in VET organisations and as the Fundamental Concept of Excellence notes: Leaders at all levels within these organisations constantly drive and inspire others towards excellence and in so doing display both role model behaviour and performance. Once collation and analysis of Results is complete, leaders must ensure that areas for improvement are identified and necessary changes and improvements made.

By fulfilling their role in each of the Steps outlined above, leaders can secure success for their organisation as a whole or for specific projects, but in order to achieve excellence, leaders must also be proactive in driving continuous improvement. Results achieved within VET organisations should be analysed by leaders to identify the learning emanating so that improvement and innovation can be applied to future service provision.

Appendix - The Case Studies

1. Development and Dissemination of Values and Promises of Values – CRPG

Values exist in every workplace and are visible through actions, not words. They form the foundation for everything that happens within an organisation.

The Why

2007 was a challenging year for CRPG. A new business model was being implemented to support delivery of CRPG’s strategy. This included changes to the:

- Methodologies for service delivery;
- Organisational structure; and
- Information management systems.

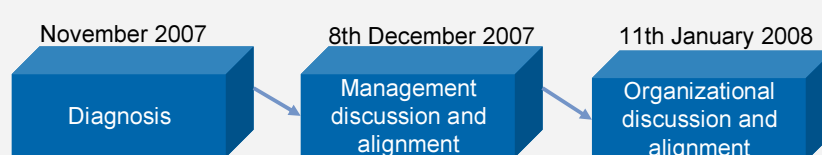
The complexity and significance of the changes being implemented presented a number of challenges to the organisation’s management team and resulted in a level of resistance amongst employees. CRPG recognised that employees needed to accept and adopt new behaviours in order to produce a desirable culture that would deliver strategic goals. The organisation identified the need to reinforce the alignment of expectations, values, behaviours and attitudes with employees.

To this end, in November 2007, CRPG engaged an external consultancy firm to undertake a cascading change management project. The first step was to prepare and align the management team, creating a shared Vision and then applying this to the whole organisation.

The How

The concept of **Internal branding** was applied to the change management project. Internal branding is *the enforcement of an organisational culture that continuously strengthens the ability to transform the promises of value provided to customers into realities which gives good reasons for "brand", organisation or service preference.*

I - The development process:



Phase 1 of the change management process, the development process followed three steps.

Step 1: Diagnosis - Facilitated by the external consultant, individual interviews with the management team (Director; Unit and Competencies Managers) were undertaken, followed by a focus group session with the change management committee.

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Step 2: Management discussion and alignment - Findings from the diagnosis informed an outdoor event for the management team. Change management issues, psychological positive capital, values and promises of values were discussed and consensus was achieved at this event.

Step 3: Organisational discussion and alignment - To consolidate the previous work another outdoor event ("Celebrating Achievements, Overcoming Challenges") was undertaken involving all CRPG employees. The purpose of the event was the deeper examination of the organisational values and promises of values. Global discussion and consensus was needed. To work on this specific issue 2 main activities were taken forward:

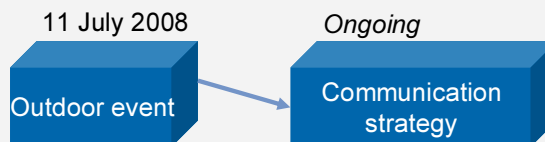
Activity #1: Promises of Value: A series of group tasks (including brainstorming, short outdoor activities and puzzle building) were taken forward to identify CRPG's client expectations and encourage team working.

Promises of Value: Customisation; Do what it takes; Ethics; Solution; Integrated Service; Professionalism; Speediness

Activity #2: Values: A workshop involving all employees allowed presentation of the organisational values, individual employee application of these to their day to day work and subsequent discussion. At the end of this process one new Value was added.

Values: Autonomy; Accountability; Planning and Organisation; Initiative; Forthright; Posture Review; Accuracy; Cooperation

II - Dissemination and ownership:



Phase 2 of the change management process followed 2 steps.

Step 1: Overcoming challenges innovating outdoor event - This half day event for all CRPG employees involved 2 main activities:

Activity #1: Values: Team design of a visual illustration of a value statement.

Activity #2: Promises of Value: Group work to match promises of value with corresponding behaviour descriptions.

Step 2: Communication strategy - The key elements of the Communications Strategy included the Internal Newsletter (one specific section with a story that portrays a possible working situation, per month) ; Posters; and Intranet publishing (outdoor *outputs*).

2. Management Development at Pluryn: 'A Discovery of Leadership'

Pluryn came into being as a result of the merger of several organisations in the first half of this decade. The resulting new organisation, new structure and new goals, prompted the need for management development. Therefore senior staff (the Boards of Executives and Directors) commissioned the development and delivery of a management development programme that was customised to meet the specific needs of Pluryn. The target group of the programme were both business unit managers and team managers.

At the time the programme started the structure of Pluryn is as follows: Small Board of Executives; Board of Directors; Business Unit Managers; Team Managers; Teams; Professionals; Staff and support.

The management development programme was developed through consultant facilitated dialogue sessions with executives, directors, managers and employees. Central to the development process was the question: what kind of leadership does the organisation need to take the next step in fulfilling its purpose? The challenge being an organisation that works in a competitive environment whilst maintaining a client-centred approach to its customers. The programme was entitled *A Discovery of Leadership* with the emphasis being placed on what leadership meant in a new organisation, topics included:

- Keeping focus on the socio-demographic, political and strategic context;
- An integral approach of health care delivery;
- Optimal use of supportive structures and services;
- Change management;
- Coaching; and
- Personal leadership.

Goals of the programme were to:

- Factor organisation architecture considerations and criteria;
- Create a clear description of management tasks, responsibilities and span of control;
- Develop as much peripheral management responsibility as possible;
- Facilitate integration between organisation units, in order to optimise an integral approach of service delivery;
- Maximise the added value of support structures and services to the service delivery; and
- Develop an empowering management style.

In order to personalise the goals all participants received support to formulate personal management development goals. This informed development of a final version of the programme.

20 business unit managers and 80 team managers participated in the programme in heterogeneous groups of 10 members (2 groups of business unit managers, 8 groups of team managers). Each group was supported by an external coach/trainer and consisted of managers from different business units (both primary process and internal support).

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The content of the programme was delivered over a 6 month period, consisting of 5, 2 ½ day sessions in an external conference centre. Each module covered one of the following topics:

- Dealing with environment stakeholder cooperation;
- Business Unit responsibilities (finance, decision making and strategic thinking);
- 5 perspectives of change management (political, project based, human resources, learning / growing / developing and dealing with chaos);
- Coaching Skills (empowering and facilitating); and
- Personal Leadership skills (how to develop personally to deliver organisational goals).

In each module, time was allocated for discussion with directors and chief executives on what the module topic meant within the new structure of Pluryn. Individual exercises and instructions allowed participants to reflect on their daily practices and the application of the topics covered to their job roles. Inter-colleague consultation sessions between participants of the programme were also facilitated. This peer support practice still exists in the organisation.

The programme had in-built flexibility throughout, the content and course could be changed, if necessary in order to address emerging needs. This approach required flexibility and tolerance for insecurity.

The programme did not target results in terms of competences, skills or behaviour and the journey of the *Discovery of Leadership* programme was viewed as being at least as important as its destination. Rather the expected results of the *Discovery of Leadership* programme were as follows.

- Creation of leaders who are conscious of how they can contribute rather than 'perfect leaders'.
- Creation of leaders who can contribute to long term organisational purpose, mission, vision and core values.
- Effective team and employee behaviour resulting from a combination of clear purpose and empowering leadership.

The final results and the benefits of the programme were as follows:

- Personal and management skills have increased;
- Core values of the organisation are more alive and being shared;
- Shared meaning and a more integral approach;
- Organisation wide supportive structure ; and
- Internal cultural differences have largely been overcome resulting in shared language and shared purpose.

The following critical remarks and key learning points were identified.

- "Safety", trust and a willingness to speak up is an important issue for participants in a management development programme, in a new organisation.
- Internal cultural differences do not disappear within a few years.
- Top leaders' behaviour is an important factor in the role modelling of managers.
- Integration of the management development programme with Organisational Development constantly needs attention.
- Management development goals are only met if deployment takes place at team, professional and service delivery levels.

3. Leading Change Management – Cedar Foundation

In the 1990s, The Cedar Foundation went through a significant period of change in response to the changing expectations of disabled people and funders. The organisation embarked on a journey moving away from the delivery of segregated services to fully inclusive programmes of support. In order to respond to the changing market, and embrace this cultural shift, Cedar committed to a process of continuous improvement. The application of a range of quality management tools including Balanced Scorecards, ISO 9001:2008, Investors in People and EFQM was central to the strategy.

The application of these quality models has driven change within Cedar and leaders have been required to employ sound systems of change management in order to successfully effect continuous improvement.

Cedar experienced a number of challenges in leading organisational change and maps these against the phases of change management: denial; resistance; exploration; and commitment.

Cedar has led change at a number of levels in its continuous improvement journey. The changes and innovations made can be categorised as:

- **Incremental** – relatively minor changes that do not have significant organisational wide impact. For example Cedar's commitment to employing person centred practices results in incremental changes and innovation on a day to day basis.
- **Radical** – a fundamental change to part of the organisation. For example the development and regional expansion of the organisation's Brain Injury Service.
- **Breakthrough** – changes that have a major impact on organisational success. For example development of Transitions, a completely new service for disabled school leavers.

There are five main triggers for change within Cedar.

- **Strategic Review** for example, identifying opportunities presented by new statutory policy direction or funding priorities.
- **Market Research** for example, demographics in increasing incidence of Brain Injury led to development of Brain Injury Service.
- **Performance Below Target** for example, falling referrals and a static population in Training Services resulted in a change from segregated to inclusive provision. In 1995 the Training Services provided circa 40 places for trainees and in 2007/08 this had risen to circa 250.
- **Benchmarking** for example, the development of Cedar's first supported living project was due in part to benchmarking with best in class providers of SMART accommodation.
- **Responding to Emerging Opportunities** for example, the re-development of Ballymena Training and Resource Centre followed an approach from a neighbouring organisation to purchase the original site.

Cedar's leaders (senior management team) select changes that need to be made through business planning and the subsequent development and review of Balanced Scorecards. Changes are prioritised by assessing their impact, urgency and importance.

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Change Management in Cedar is organised against the EFQM RADAR system:

- Results – what does the organisation want to achieve?
- Approach – planning, communicating and resourcing the change
- Deployment – Leading, implementing and supporting the change
- Assessment and Review – Formative and summative evaluation of the change
- Results – has the organisation achieved the results it wanted to secure?

The development of Cedar's Brain Injury Service can be used as an example to further illustrate this approach.

Results – Advances in acute care resulted in increasing numbers of people surviving brain injury. However there was a lack of any services for people with a brain injury once they had left hospital. Cedar therefore sought to establish and pilot a model of practice that was capable of replication for this emerging population.

Approach – Initially Cedar engaged an external consultant to undertake market research and gather further information through an assessment of need. European benchmarking with market leaders (organisations already skilled in the provision of vocational rehabilitation) followed. This enabled Cedar to define a model of practice and associated business plan which progressed a successful application to the European Social Fund's Horizon programme. Key to this stage was ongoing engagement and communication with stakeholders including people with brain injury and the health and social care professionals working with them.

Deployment – Cedar recognises the importance of top management commitment and the positive impact this has on driving change forward. Therefore the Chief and Deputy Chief Executives of Cedar were involved in the pilot programme and the subsequent roll out. A sound infrastructure was developed for project delivery including the appointment of a Head of Service and vocational rehabilitation staff. Consistent application and review of practice within the service is now assured through the ISO 9001:2008 quality management system. Ongoing contact and consultation with stakeholders secured their support and commitment.

Assessment and Review – The development of the Brain Injury Service was governed by Steering Groups and Project Review Teams that oversaw project evaluation. Cedar employs both formative and summative evaluation believing that successful projects are those that learn from things as they happen and that make changes at the relevant times.

Results – The previous stage allowed Cedar to gather evidence and data to assess performance and to determine whether the results sought had been achieved. The pilot project that initiated the establishment of the Brain Injury Service was a success, a second Horizon funded project was secured and a regional service supported through European and statutory funding is now in place. Currently almost 250 people with a brain injury benefit from the service, a significant percentage of whom gain a positive outcome. In the past two years, 100% of Brain Injury Service customers have expressed satisfaction with the service received.

For Cedar, effective change management results in a successful change outcome. By employing sound change management strategies leaders deliver a dynamic organisation that keeps pace with best practice, satisfies customers and motivates staff.

4. Change Management – Josefsheim Bigge (JG Group)

For Josefsheim Bigge change management comprises all measures and activities associated with comprehensive change for the implementation of new strategies, structures, systems, processes and attitudes in an organisation. Change management is viewed as an integral part of strategic business policy and as such it is a standard procedure in the company.

The integration of a workgroup from the Josefsheim Sheltered Workshop in an industrial factory can be used as an example of the organisation's approach to change management. This project involved 2 partners:

- **The Bigge Workshops at the Josefsheim gGmbH** a not for profit organisation and subsidiary of the Josefs-Gesellschaft, offering range of work options to 250 disabled people.
- **The Olsberg Hermann Everken GmbH** a medium sized manufacturing company employing 500 staff based in Olsberg supplying fire stoves and manufacturing electrical storage heaters.

Before the start of this project, Josefsheim Bigge and Olsberg Hermann Everken GmbH had a long standing working relationship with Josefsheim acting as a subcontractor. Whilst successful, this partnership had two drawbacks: the additional costs incurred by the Olsberg Hermann Everken GmbH in delivering parts to the Sheltered Workshop; and the lack of alternative, inclusive opportunities for employees of the Sheltered Workshop due to a range of barriers in the general job market.

The objectives of the project were as follows.

Business Objectives

- To gain acceptance of people with disabilities in the general job market.
- To integrate people with disabilities in all production stages of the host organisation.
- To give people with disabilities the educational opportunities to widen their professional, personal and social skills.
- To enable people with disabilities to work under normal conditions by integrating jobs from the Sheltered Workshop in outside companies; thereby increasing their chances of qualifying for jobs which provide compulsory social insurance.

Strategic Objectives

- To achieve acceptance of people with disabilities by implementing the relocation of the workgroup to private companies.
- To give the disabled employees the qualifications needed to enter the general job market.
- To take the disabled employees out of the workgroup, place them in other production processes and move them around as needed.
- To convince the company managers that people with disabilities are just as good as any other employees – with the same strengths and weaknesses.
- To provide an opportunity for disabled and non-disabled people to work and learn together.
- To deliver a win-win situation for partner organisations.

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Approach - The first stage of the project was identification of a suitable company prepared to employ a working group on the basis of economic gains and social benefits. Then, to gain acceptance for the concept with sponsors and stakeholders including company and workshop employees. This stage was essential in combating any resistance to the proposed change and enabling Josefsheim to draw up a time schedule, work plan and financial plan.

Implementation - The change process was implemented in three phases as follows.

Phase 1: Initiation and Management - This involved the initial activities / arrangements required to allow the Workshop employees to commence employment with Olsberg Hermann Everken GmbH. This included: optimising the accessibility of the workplace; developing individual support plans; completing job analysis; and drafting communication and cooperation plans.

Phase 2: Stabilisation and development - Once the workgroup of 10 disabled people were working within the company it was possible to assess their individual potential 'on the job'. This assessment informed the placement of individuals outside the group, in other work areas.

Phase 3: Integration - Ultimately, the group became fully integrated in the production process of the company, working independently and requiring reduced support from the group leader.

Assessment and Review - The success of the change was assessed through interview with the disabled people and staff from the host company. The following factors were considered: participants' preference for sheltered or mainstream employment; the quality of the work performed by the disabled employee; the level of inclusion in the work process; and the number of disabled people achieving a temporary or total transfer to the general job market.

Results - All parties expressed satisfaction with the project. The disabled employees involved became fully integrated into their workplace, operating independently, with reduced support and moving to a range of roles within the company. They thereby derived all the benefits associated with mainstream employment. In addition, Olsberg Hermann Everken GmbH was presented with 2 prestigious awards in 2007 as a result of their involvement (Innovation Award of North Rhine-Westphalia and Business Award for Social Commitment).

Josefsheim Bigge now intends to build upon the success of the project, working with other employers in order to extend the opportunity of working in a mainstream setting to the wider client group.

The key lessons learnt are as follows.

- The integration of disabled employees in Olsberg Hermann Everken GmbH was successful.
- The self-confidence and self-esteem of the disabled people increased.
- The disabled people became very committed and dedicated employees of Olsberg Hermann Everken GmbH.
- The factory employees lost any reservations and prejudices they may have had concerning people with disabilities.
- Those responsible for hiring personnel in the company overcame the prejudices associated with employing disabled people.
- Additional disability awareness training needs to be delivered to employees from the host organisation.

5. Deployment of Key Performance Results – National Learning Network

This paper describes the process whereby Key Performance Results (KPRs) are developed and deployed throughout National Learning Network (NLN). It was developed within the overall Business Excellence key concept of Leadership and Constancy of Purpose. It addresses the principle in the Business Excellence literature that “the behaviour of an organisation’s leaders creates a clarity and unity of purpose within the organisation...”

NLN is the training and employment division of the Rehab Group and is Ireland’s largest non-government, not-for-profit training organisation providing a range of quality, accredited training and support services to disabled people and others disadvantaged in the labour market.

KPR PROCESS - The steps in NLN’s KPR process are as follows:

1. The NLN management team agrees national KPRs in conjunction with staff, learners and external stakeholders.
2. The national KPRs are deployed through the three operational regions and support functions.
3. Regions, centres and functions develop plans to contribute to national targets.
4. Reports are issued on financial performance, places filled, outcomes etc.
5. Progress is reviewed monthly.

KPR HEADINGS - National Learning Network’s KPRs are developed under 10 headings:

- | | |
|------------------------|----------------------------------|
| 1. Allocations | 6. Quality, Standards & Supports |
| 2. Finance | 7. Learning & Assessment |
| 3. Outcomes | 8. Marketing & Communications |
| 4. Learner Involvement | 9. Rehab Group |
| 5. Human Resources | 10. Health & Safety |

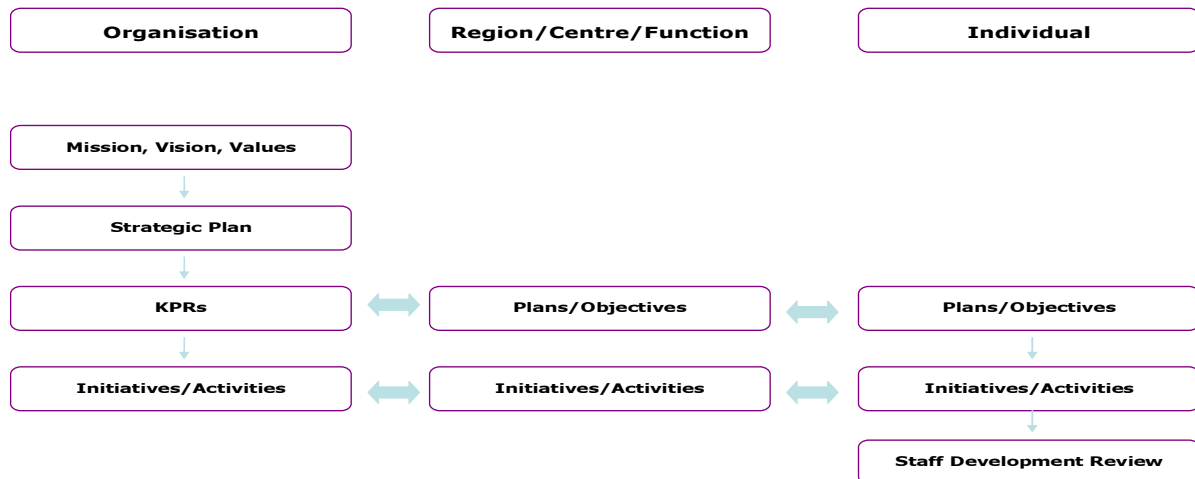
Each heading contains up to three specific targets.

LEADERSHIP ROLE - Development and deployment of the KPRs enhances the role of leadership within NLN. It provides a clear focus on what the organisation wants to achieve and a mechanism to define internal and external targets. It allows targets to be aligned with the organisation’s Mission & Vision and with its 3 year strategic plan.

The system provides a framework for developing regional/local/functional plans & activities and for measuring progress against them. It promotes the engagement and accountability of staff in setting and reviewing targets and promotes continuous improvement.

LEADERSHIP AND CONSTANCY OF PURPOSE INNOVATIVE PRACTICE GUIDE

Strategic Alignment



EVALUATION AND REVIEW - The system is subject to ongoing internal review and formal review linked with annual planning. The most recent external evaluation of the system was a 2008 Business Excellence assessment which reported that KPRs are effectively deployed and understood in NLN. There were also some areas for improvement, particularly that some KPRs did not have quantitative outcome measures and that links with strategic objectives were not clear enough in some cases. These items were addressed in the last round of annual planning.

Effective review requires continuous production of accurate data in all areas where targets have been set. NLN operates a number of management information systems including:

- A customised database to record occupancy, training outcomes and Individual Action Plan (IAP) actions achieved;
- Computerised accounts systems to record financial results; and
- A human resource database to record recruitment, health & safety and staff training data.

In addition NLN uses internal and external surveys to record service user satisfaction and experience and staff engagement. In all cases data is recorded and reported at programme, area, region and national levels to allow for internal comparisons and benchmarking.

FUTURE DIRECTIONS - In a continuous improvement context NLN will: continue to refine and improve the KPR system; add to and improve the management information systems to provide more timely and accurate data; and continue to develop external benchmarking opportunities.

The effectiveness of NLN's systems has been acknowledged by the Business Excellence assessors in 2008: *"There is clear evidence that the leadership team is leading and supporting continuous improvement activities through the Business Excellence model and reinforcing a culture of excellence in the organisation"*. EFQM Recognised for Excellence report 2008



EQUABENCH—Benchmarking European Excellence

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Project Partners

The Cedar Foundation

www.cedar-foundation.org

European Platform for Rehabilitation

www.epr.eu

Josefsheim gGmbH

www.josefsheim-bigge.de

National Learning Network

www.rehab.ie

Centro Studi Opera Don Calabria

www.centrodoncalabria.it

Pluryn Arbeid

www.pluryn.nl

Centro de Reabilitação Profissional de Gaia

www.crbpg.pt

**University Rehabilitation Institute
Republic of Slovenia**

www.ir-rs.si

The Equabench Innovative Practice Guides are available in a range of alternative, accessible formats on request from The Cedar Foundation