

EQUABENCH—Benchmarking European Excellence

Continuous Learning, Innovation & Improvement 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 – Continuous Learning, Innovation and Improvement.

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

Continuous Learning, Innovation and Improvement - The EFQM Fundamental Concept

The Concept

Excellence is challenging the status quo and effecting change by utilising learning to create innovation and improvement opportunities.

How the Concept is put into Practice

Excellent organisations continuously learn, both from their own activities and performance and from others. They rigorously benchmark, both internally and externally. They capture and share the knowledge of their people in order to maximise learning across and within the organisation. There is an openness to accept and use ideas from all stakeholders. People are encouraged to look beyond today and today's capabilities. They are careful to guard their intellectual property and to exploit it for commercial gain, where appropriate. Their people constantly challenge the status quo and seek opportunities for continuous innovation and improvement that add value.

The Benefits

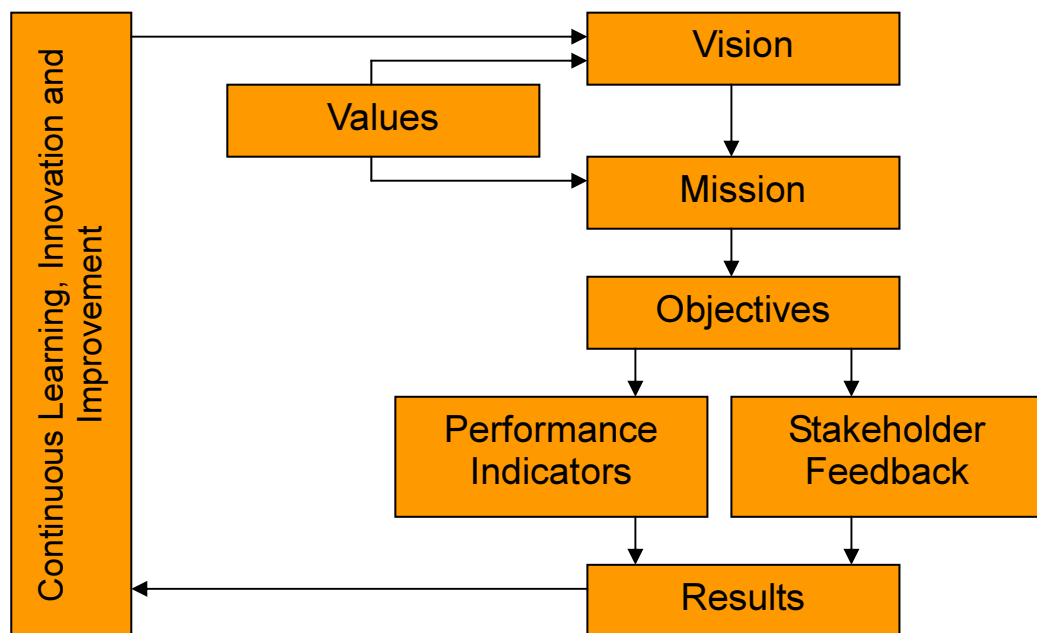
- Improved value generation.
- Improved effectiveness and efficiency.
- Increased competitiveness.
- Innovation in products and services.
- Knowledge capture and sharing.
- Organisational agility.

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.



The case studies appended to this Guide describe how partners are driving a particular improvement in their own organisation by importing an innovative practice from another EQUABENCH partner. This Guide will draw on aspects of this practice and also on practice examples included in the case studies of previous Guides in the series to illustrate the practical steps.

The Practical Steps to Providing Continuous Learning, Innovation and Improvement

Vision and Values

The EFQM Fundamental Concept of Excellence views excellence in Continuous Learning, Innovation and Improvement as challenging the status quo and effecting change by utilising learning to create innovation and improvement opportunities.

VET organisations seeking to progress towards excellence need to have a clear Vision of how they will manage continuous improvement through a process of cyclical review. A review cycle lies at the heart of all quality management systems concerned with continuous improvement. For example, the EFQM Excellence Model focuses on the RADAR system while others base their approach around the Deming Wheel or Shewhart Cycle of PLAN-DO-CHECK-ACT (PDCA).

However, continuous improvement, innovation and learning will not be delivered unless an organisation is culturally open to, and accepting of, the need to change. This needs to be reflected in the Value base and attitudes of the organisation's people. As the Fundamental Concept of Excellence notes: "people constantly challenge the status quo and seek opportunities for continuous innovation and improvement that add value".

For example, in the Results Orientation Innovative Practice Guide, Josefsheim describes how its Objectives Matrix (the high level tool used for organisational planning and control) is in a continuous state of flux due to internal and external influences. The Objectives Matrix, mapped against the PDCA cycle provides the basis for Josefsheim's approach to continuous learning and improvement.

In the People Development and Involvement Guide, Cedar describes how it applies the Investors in People (IiP) Standard to promote a culture of continuous improvement. Two of the IiP Indicators are particularly relevant:

- A strategy for improving performance of the organisation is clearly defined and understood; and
- Employees are involved in continuous improvement.

Mission

For a VET organisation, the Mission in relation to Continuous Learning, Innovation and Improvement should be to operate a sound range of mechanisms to inform change and drive action. As the Fundamental Concept stipulates, "excellent organisations

continuously learn from their own activities and performance and from others”. Therefore mechanisms are required to allow an organisation to identify the need for improvement or opportunity to innovate and to drive forward the associated activity.

A VET organisation can choose from a range of quality management systems available across Europe e.g. EFQM, EQUASS and ISO 9001:2008 to drive Continuous Learning, Innovation and Improvement. Alternatively they may choose to apply the principles of such systems, customising them to meet the needs of the organisation. Whatever mechanism is chosen, it is vital that an approach has been determined and is in place.

For example, in the Management by Processes and Facts Innovative Practice Guide URI describes how it applies an ISO 9001 system to quality assure and continually improve its vocational rehabilitation service. In-built quality indicators provide data that informs planning and decision making at 3 levels: Individual, Process and Outcome level.

Also, in the Leadership and Constancy of Purpose Guide, NLN describes its approach to the deployment of Key Performance Results as a means to promoting continuous improvement and meeting the requirements of the EFQM Excellence Model.

Objectives

Clarity of Vision, Values and Mission allow an organisation to map a broad approach to Continuous Learning, Innovation and Improvement. However, it is then essential to plan, develop and deploy the approaches into practical actions and tasks. This is best managed through objectives.

In practice, VET organisations will normally need to deploy a range of mechanisms to effect a sound approach to Continuous Learning, Innovation and Improvement. The Fundamental Concept specifically references the need to capture and share knowledge and the need to benchmark internally and externally.

For example, in the People Development and Involvement Guide Pluryn describes its approach to harnessing the expert knowledge of its staff and clients. Pluryn believes that its people have hidden expert knowledge gained from experience and learning. The organisation uses 3 instruments to allow people to access this knowledge and learn from each other.

In the same Guide Josefsheim describes their Award for Innovation which aims to promote staff and service user innovation beyond day to day activities and Cedar describes their annual awards scheme which recognises individuals or staff teams for improvement ideas.

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The case studies appended to this Guide describe in detail the benchmarking approaches undertaken by each Equabench partner to import an innovative practice.

Performance Indicators and Stakeholder Feedback

Performance Indicators and Stakeholder Feedback are an integral aspect of Continuous Learning, Innovation and Improvement. In addition to benchmarking, market research, external feedback and new learning, Performance Indicators and Stakeholder Feedback are key triggers for change.

Performance Indicators

These are measurable indicators of performance or a stepping stone to be used along an agreed pathway that will show whether the organisation is making progress towards achieving its objectives and targeted results. Performance Indicators should be closely aligned to objectives and may in effect provide the 'measurable' element of the SMART acronym.

In relation to Continuous Learning, Innovation and Improvement, Performance Indicators can be used in two ways. Firstly, as a means to identify the need for learning, innovation or improvement and secondly, as a means of tracking the impact of learning, innovation or improvement.

For example:

- In the Leadership and Constancy of Purpose Innovative Practice Guide Cedar cites 5 main triggers for change. One such trigger is Performance Below Target; and
- In the Results Orientation Innovative Practice Guide Centro Studi describes the development of an innovative Self Help Project to improve the organisation's performance in placing people with psychiatric disorders in employment. Clear Performance Indicators were in place to track the impact of the project.

Stakeholder Feedback

The Fundamental Concept of Excellence views excellent organisations as those that are open to accepting and using ideas from all stakeholders. VET organisations tend to have a complex group of stakeholders from whom a wealth of feedback to inform Continuous Learning, Innovation and Improvement can be secured.

However, the leaders of VET organisations may need to prioritise and balance the views of stakeholders, particularly where they conflict i.e. a purchaser's view versus a

service user's view. This is best achieved within the context of the organisation's Vision, Mission and Values.

Equabench partners use a wide range of mechanisms to secure customer feedback and many are described in the case study examples included in each of the Innovative Practice Guides.

It is however insufficient to secure stakeholder feedback without using it to inform future action. For example, NLN used staff feedback sourced from the staff survey, a representative working group and focus groups to develop their Staff Development Review Process. This approach is described in the People Development and Involvement Innovative Practice Guide.

Also, in the Customer Focus Guide, CRPG describes how stakeholder need (both staff and clients) informed the development of their Neuropsychological Rehabilitation Programme and Individual Plan.

Results

Organisations must ensure that qualitative and quantitative Results are collated using robust mechanisms to determine whether Performance Indicators have been achieved. Analysis must then be undertaken to assess whether the intervention has had the desired impact.

VET Organisations taking an effective approach to Continuous Learning, Innovation and Improvement can expect to enjoy the following results.

- Improved value generation, for example, in the Results Orientation Innovative Practice Guide CRPG describes how they added value to their programmes by better measuring the softer indicators of interventions by applying the Quality of Life Model.
- Improved effectiveness and efficiency, for example, in the Results Orientation Innovative Practice Guide URI describes how they enhanced their Vocational Rehabilitation Results by introducing a Case Management approach.
- Increased competitiveness, for example, both Cedar and Centro Studi describe the merits of the Balanced Scorecard in the Results Orientation Innovative Practice Guide.
- Innovation in products and services, for example, in the Customer Focus Innovative Practice Guide CRPG discusses the introduction of 3 new innovative aspects to their Neuropsychological Rehabilitation Programme following a retrospective study evaluating 5 years of practice.
- Knowledge capture and sharing, for example, Josefsheim describes the role played by the Intranet in effective knowledge management following a recent

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improvement project in the Management by Processes and Facts Innovative Practice Guide.

- Organisational Agility, for example, in the Leadership and Constancy of Purpose Innovative Practice Guide both Cedar and Josefsheim describe their approaches to change management, demonstrating their agility and ability to readily respond to opportunities for improvement and innovation.
- External validation and recognition, for example, NLN's internally developed Staff Development Review Process which is described in the People Development and Involvement Innovative Practice Guide contributed to the organisation's achievement of Excellence through People at gold standard level.

Continuous Learning, Innovation and Improvement

An organisation is likely to find Continuous Learning, Innovation and Improvement more challenging at the start of their quality journey. As their commitment to excellence continues however, the time invested will reap rewards not just in the improvements made to services delivered, but in the lessons learnt, approaches developed and culture embedded.

For organisations working in the VET sector, Continuous Learning, Innovation and Improvement are essential elements to secure longevity and sustainability. Equally, the longer an organisation practices continuous improvement the easier it becomes because the right culture and the right techniques are in place to facilitate the process.

Appendix - The Case Studies

Introduction

A core part of the EQUABENCH project was the transfer of innovation from one network member to another and therefore seven VET partners had to commit to the import of at least one innovative practice as part of the project. The following case studies describe the import of five practices by the seven partners. The practices described are being exported by four EQUABENCH Network members: Pluryn Arbeid , Josefsheim gGmbH , Centro de Reabilitação Profissional de Gaia and The Cedar Foundation.

Two EQUABENCH partners chose to import two innovative practices i.e. Cedar and NLN, the remaining five partners chose to import one practice only, but with indications that further import of additional practices was likely beyond the lifetime of the project. For example URI intends to import both the Vrij Baan model from Pluryn and the Quality of Life Outcome Evaluation tool from CRPG. The transfer of innovation through the import and export of practice within the EQUABENCH partnership is tabulated below.

Exported From	Practice	Imported To
Pluryn	Discovery of Leadership	<ul style="list-style-type: none"> • Cedar
Pluryn	VrijBaan and Request Empowerment Instruments	<ul style="list-style-type: none"> • Josefsheim Bigge • CRPG
Josefsheim Bigge	Knowledge Management / Website Development	<ul style="list-style-type: none"> • Cedar
CRPG	Quality of Life Outcome Evaluation	<ul style="list-style-type: none"> • Centro Studi • NLN
Cedar	Balanced Scorecards	<ul style="list-style-type: none"> • Pluryn • URI • NLN

Each partner was required to complete a report detailing the process for the import of innovative practice including detail on the work undertaken and the progress made. The reports map readily to the practical steps for Continuous Learning, Innovation and Improvement described in the previous section as follows.

Vision and Values	What was the need? Why was the practice being imported?
Mission	What practice was being imported?
Objectives	How the practice was imported?
Performance Indicators / Stakeholder Feedback	How would success be measured? What baseline data was available?
Results	How would the impact be evaluated?
Continuous Learning, Innovation and Improvement	What were the lessons learnt?

1 Import of the Discovery of Leadership Programme from Pluryn to Cedar

Importing Partner Cedar **Exporting Partner** Pluryn

Summary of Innovative Practice Being Imported:

- **What is being imported?**
- **Why is it being imported?**

The Cedar Foundation decided to import Pluryn's Discovery of Leadership Programme, adapted and applied to meet the specific organisational need for a bespoke Deputy Manager Training programme. The Discovery of Leadership programme is described in the Leadership and Constancy of Purpose Innovative Practice Guide.

Cedar needed this programme to equip the growing numbers of Deputy Managers with the skills and knowledge to perform effectively in their crucial role. This need was identified internally, through appraisal and externally, through ISO Management Review. The key aspects of Pluryn's approach which interested Cedar were:

- The more unified approach resulting from the programme. Pluryn developed the programme in part to respond to the challenges of bringing together a range of organisations into a cohesive whole following a series of mergers. Whilst Cedar is not currently in this situation the organisation had a disparate range of services that would benefit from a more unified approach.
- The opportunities for cross fertilisation between programme participants. Cedar values the impact of peer learning and peer support, but recognised that there were limited opportunities for Deputy Managers to meet and form the necessary underpinning relationships.
- How Pluryn had embedded their organisational Values in the training.
- The client centred approach and focus.
- The agenda around working competitively in a business environment.

Import Activities

The following activities have, or will, facilitate and support the import of practice.

- Benchmarking Pluryn's approach through the Equabench workshop on Leadership and Constancy of Purpose and subsequent follow up contacts.
- Application of the benchmarked approach to meet Cedar's needs and mapping Pluryn's learning topics against Cedar's Management Charter.
- Development of an in house Training Programme entitled Learn, Lead, Manage, development of learning materials and identification of resources for delivery.
- Pilot training delivered to 13 Deputy Managers in June 2010
- Development of evaluation questionnaires for each session and a pre and post training assessment of need by participants.
- Comparison / analysis of Pluryn's evaluation of Discovery of Leadership.
- Comprehensive evaluation of the pilot programme including an assessment of impact.
- Adjustment of the programme to reflect evaluation findings and roll out across the whole organisation.

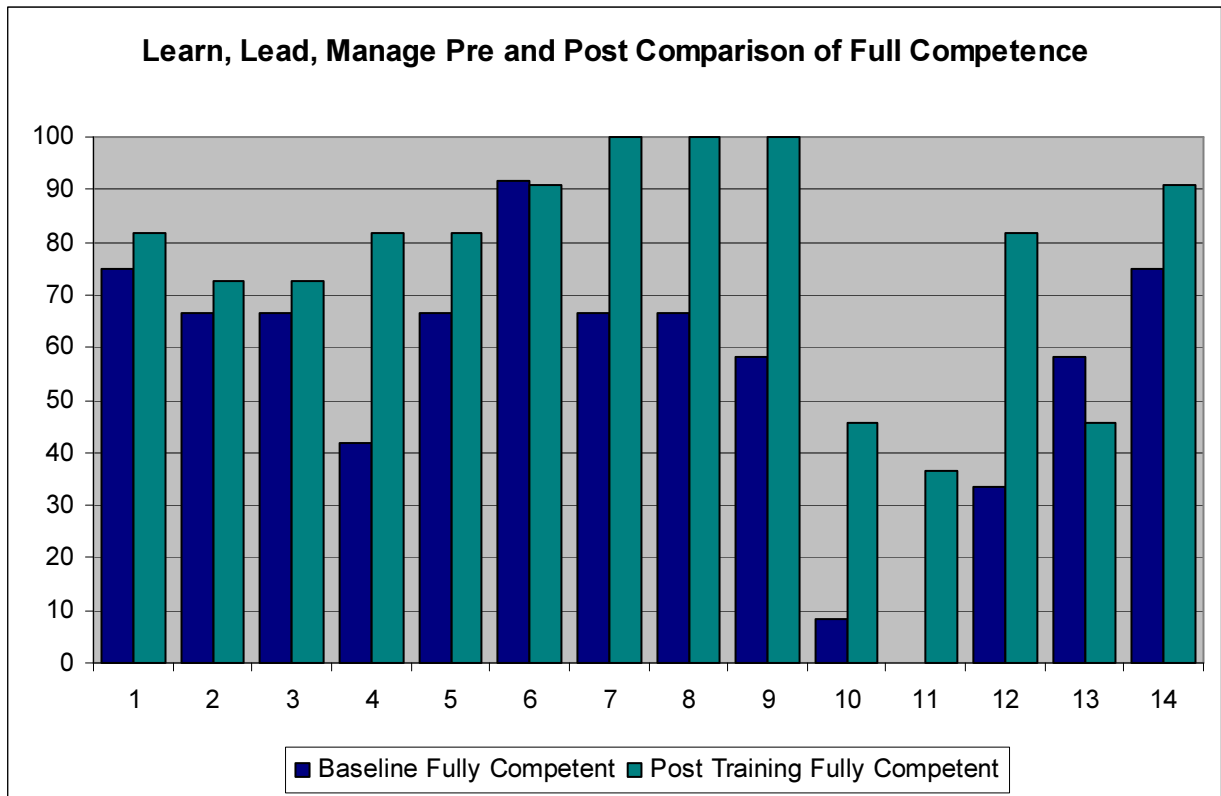
Evaluation of Impact

- **How will impact be measured?**
- **What baseline information has been recorded?**

Cedar’s evaluation of Learn, Lead, Manage comprised two key tools namely, a Training Questionnaire and a Self Assessment Tool to determine if the objectives of the project were met. The Training Questionnaire was administered after each session, focusing on the session content, the delivery and the venue.

The Self Assessment Tool was administered pre and post training so that comparative data could be collected and analysed.

As the figure below illustrates, the transfer of innovation has been a success with participants rating their competence more highly after taking part in the training in most areas. 100% of the pilot participants said that they rated their skills more highly following training.



“I took away a lot of positives and increased self confidence from the course. A big positive was also being part of the deputy manager team across the whole organisation and feeling that as a group we had a core role in taking forward Cedar’s Vision, Mission and Values.”
 Learn, Lead, Manage pilot participant.

2 Import of the VrijBaan and Request Empowerment Instruments from Pluryn to Josefsheim Bigge and CRPG

Importing Partners Josefsheim Bigge and CRPG

Exporting Partner Pluryn

Summary of Innovative Practice Being Imported:

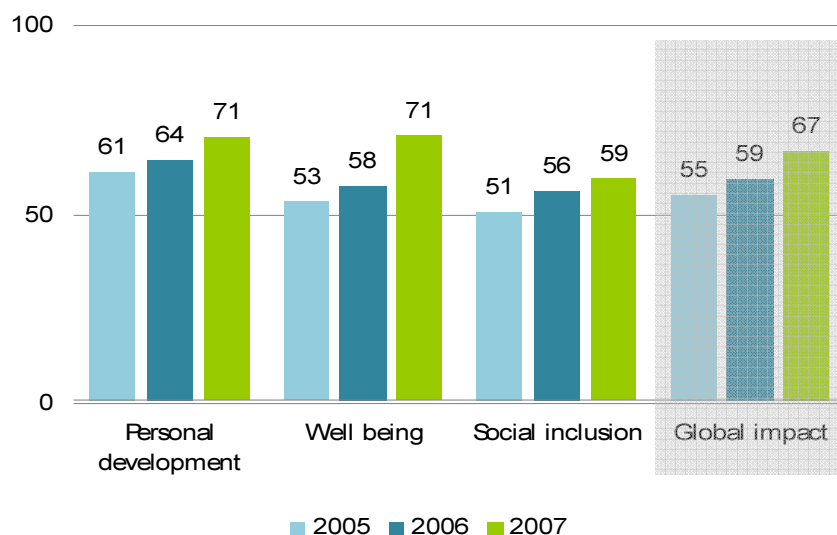
- **What is being imported?**
- **Why is it being imported?**

CRPG and Josefsheim Bigge decided to import Pluryn's Empowerment Instruments VrijBaan and Request. These tools are described in the Customer Focus Innovative Practice Guide.

Both organisations had comparable reasons for seeking to import this practice. Both had the concept of empowerment as a central facet of their value base and organisational ethics, yet both had evidence from external feedback that their approach could be improved.

Josefsheim Bigge has 760 diverse staff who each have a different perspective on empowerment and whilst the organisation felt that their approach to empowerment was sound, this was not reflected in assessments against the EQUASS Excellence Quality Management System which made recommendations for improvement around empowerment.

Likewise, CRPG's assessments against the Participation principle of EQUASS Excellence have attracted a lower score than in other areas. Furthermore, CRPG's outcome measurement shows that the organisation's performance in relation to social inclusion is less good than on other outcome areas as is illustrated below.



The import of VrijBaan and Request will allow Josefsheim and CRPG to deploy measures to assess the empowerment of their clients at the start of the intervention and then to have and use the tools to improve empowerment during the intervention. Staff will be supported to

facilitate this empowerment through the import of Request.

Import Activities

Josefsheim Bigge

The following activities have, or will, facilitate and support the import of practice.

- An initial meeting of the key players from Josefsheim, Pluryn and REA College involved in the import and export of the practice in Josefsheim Bigge to take stock of the current position and agree an action plan of next steps.
- A self evaluation of Josefsheim, focusing on both staff (circa 650) and service users (circa 750) customised to meet the needs of the full target group. Clients include children, adults, people with complex needs and staff encompass professionals and ancillary staff.
- Analysis of the self assessment by Pluryn resulting in an empowerment profile.
- Identification of areas for improvement and associated recommendations for action.
- Subsequent and resultant realisation of planned actions.

CRPG

The following activities have, or will, facilitate and support the import of practice. The success of each phase is dependent upon support from Pluryn and REA College.

- Reception and translation of all materials with full respect paid to Pluryn's intellectual property.
- In house training to an initial cohort of 15 employees for 3-4 days and then a 2nd cohort of 15.
- Implementation: the first phase involving work with CRPG case managers and vocational training professionals, the second phase extending the roll out to all staff. Application of the VrijBaan framework to circa 90 clients in vocational training.
- Evaluation of results.

Evaluation of Impact

- **How will impact be measured?**
- **What baseline information has been recorded?**

Josefsheim Bigge

A long term assessment of impact through a pre and post comparison, two years after the practice has been imported is planned. The timescale takes cognisance of the size of the organisation and the entrenched attitudes of the long serving staff. Baseline information has been collected from staff and service users using a self reflection questionnaire. The impact of this particular example of practice import is potentially very significant if Josefsheim's plans to become the licence holder for Request and Vrij Baan in Germany come to fruition.

CRPG

Both Vrij Baan and Request include an initial assessment and the impact of the imported practice will be measured against this baseline. The impact will also be assessed by using a range of existing CRPG evaluation tools namely: the Quality Evaluation Index, the Outcome Measurement Index and the Organisation Climate Index. These indexes are systematically measured in CRPG on an annual basis and the results from the previous year, prior to the import will be used as a baseline. CRPG also intends to develop a specific questionnaire to test the relationship between clients and professionals.

3 Import of Knowledge Management / Website Development from Josefsheim Bigge to Cedar

Importing Partners Cedar **Exporting Partner** Josefsheim Bigge

Summary of Innovative Practice Being Imported:

- **What is being imported?**
- **Why is it being imported?**

The Cedar Foundation's website had become largely outdated and did not meet the needs of stakeholders, particularly staff and service users. Cedar was inspired by Josefsheim Bigge's use of their intranet for effective knowledge management, its application as a source of information, a tool for communication and a service resource. Josefsheim's intranet is designed to look and navigate like a website to promote familiarity and accessibility to users. Josefsheim's approach is described in the Management by Processes and Facts Innovative Practice Guide. At the time of import, Cedar operated an intranet and internet site which had significant gaps and areas of overlap. Cedar chose to apply the learning and expertise of Josefsheim to improve their website making it:

- A better resource for knowledge management;
- A more intuitive and comprehensive information base for stakeholders; and
- A resource to provide social networking opportunities for service users and staff.

Import Activities

The following activities have, or will, facilitate and support the import of practice.

- Initial benchmarking of Josefsheim's approach through EQUABENCH workshops and subsequent follow up.
- Additional benchmarking with Josefsheim via scheduled EQUABENCH meetings and information exchange.
- Securing adequate financial resources to take forward developments. Cedar secured £105,000 to undertake the project.
- Tendering and appointment of a sub contractor.
- Agreement of a project plan of 20 months duration.
- Consultation with key stakeholders through Phase 1 of the project.
- Collection of baseline data from key stakeholders via an on line survey and focus groups to inform the project plan.
- Delivery of the new website to schedule.
- Evaluation of impact through an on line survey and comparison with baseline data.

Evaluation of Impact

- **How will impact be measured?**
- **What baseline information has been recorded?**

Cedar will evaluate the impact of the new website through stakeholder assessment. Stakeholders will be specifically asked to consider whether the website has improved:

- Access to information;
- Knowledge management;

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- Dissemination of products and results; and
- Marketing of services.

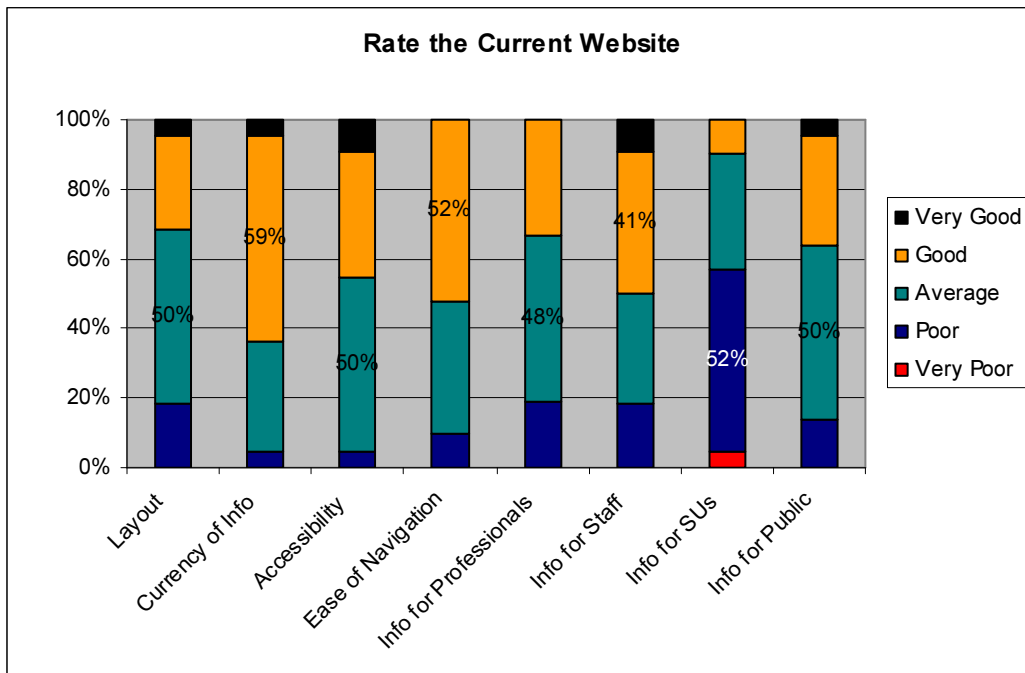
Service Users will be asked to assess the website in terms of:

- Improved communication;
- Improved social networking opportunities; and
- Increased support to achieve economic inclusion.

Staff will be asked to assess the website in relation to:

- Improved access to information and knowledge;
- Improved communication on organisational development;
- Improved interdepartmental communication; and
- Increased linkages between staff teams.

Cedar conducted an on line survey with all key stakeholders to inform the project plan and to quantify baseline data for subsequent comparison with the data elicited from the above evaluation. The survey asked participants to specify how frequently they used the current website, what uses they made of the current website and to rate the current website against a range of specific criteria. The figure illustrated below shows the baseline results for the latter.



The stakeholders were also asked to suggest specific improvements which could be made to the current website and 91% of respondents made a suggestion. For example, 30% of respondents felt that the website could have improved and customised stakeholder information and 25% that the website could be better organised, have improved layout, easier navigation and more hyperlinks. This feedback has shaped the design of the new website and has informed the work of the improvement team.

4 Import of Quality of Life Outcome Evaluation from CRPG to Centro Studi and NLN

Importing Partners Centro Studi and NLN **Exporting Partner** CRPG

Summary of Innovative Practice Being Imported:

- **What is being imported?**
- **Why is it being imported?**

Centro Studi and NLN decided to import CRPG's outcome measurement tool based on the Quality of Life model. The methodology evaluates the impact of services on the clients' quality of life by analysing three dimensions: Personal development, Well-being and Social Inclusion. The approach is fully described in the Results Orientation Innovative Practice Guide.

Whilst both organisations provide a holistic range of services to their clients and both are committed to continuous improvement, neither organisation has a tool which quantifies the impact their services have on an individual's quality of life.

Centro Studi provides a range of single, integrated services to its clients and client satisfaction with these single services is measured. The Quality of Life outcome evaluation tool will allow the organisation to assess the holistic intervention provided to clients and their perception of their quality of life as an outcome of the implemented activities.

From NLN's perspective, the tool provides a means of validating the value of activities to stakeholders and the wider community. In addition, funders in Ireland are placing greater emphasis on qualitative outcome information to demonstrate effectiveness and import of the tool will allow NLN to accurately record such data. NLN will import and apply the tool to measure:

- The overall impact of interventions on a learner;
- The relative outcomes for learners in order to identify the extent of benefit achieved from the services provided (i.e. those who benefit most and least);
- The effectiveness and efficiency of the services provided i.e. the relationship between intervention outcomes and resources used; and
- How to effectively plan services to achieve learner goals, service delivery goals and resourcing goals.

Import Activities

The CRPG tool will be adapted and applied to the local context of both NLN and Centro Studi. For example, in CRPG the tool is administered six months after someone has left the programme and this is not possible in NLN's context. Therefore, NLN will adapt the tool so that it can be administered at the point of exit. In Centro Studi, an improvement team will adapt the questionnaire as a tool to measure the outcomes of integrated services rather than the output of the single services. The following activities have, or will, facilitate and support the import of the tool.

Centro Studi

- Initial benchmarking with CRPG through EQUABENCH networks and subsequent contacts.
- Acquisition and translation of the original questionnaire from CRPG into Italian.
- Adaptation of the questionnaire to the Italian / local context.
- Identification of target groups to test the questionnaire and identification of staff involved.
- Pilot the questionnaire with two target groups (Verona and Ferrara) of ten people each.
- Presentation of the questionnaire as an innovative tool inside and outside the organisation.
- Data analysis for internal validation.
- Re-translation of the Questionnaire into English.
- External validation by CRPG.
- Internal mainstreaming (use of the questionnaire within the training activities of Opera Don Calabria Centres).
- External dissemination (the organisation will propose the questionnaire as a tool for evaluating projects carried out in partnership with other organisations).
- Adoption of the Questionnaire in other sites of Opera Don Calabria which provide services for people with disability (at least Rome and Potenza).
- Adaptation of the Questionnaire for other target groups of Opera Don Calabria (e.g. socially disadvantaged people, if applicable).

NLN

Phase 1

- CRPG Questionnaire proofed for use by NLN Learners.
- New Employability questions developed to augment the CRPG Questionnaire.
- Questionnaires completed by 20 Learners between January – June 2010 to test usability.

This phase was facilitated by:

- Identification of three Business Studies Courses in three locations;
- Discussions with Area Managers/Staff;
- Circulation of questionnaires to Area Managers;
- Completion of questionnaires in confidence by Learners prior to leaving course; and
- Data inputted and results from the pilot analysed.

Phase 2

- A larger pilot with Vocational Training programmes.
- Pilot with Learners from Rehabilitation Training programmes.
- Further Development of the questionnaire (easy read version).
- Evaluation of the second Pilot.

This phase will be facilitated by:

- Presentation of the system to the NLN management team;
- Individual Meetings with Regional Management teams;
- Identification of Pilot Areas/Courses; and
- Adaptation of the system by NLN.

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Evaluation of Impact

- **How will impact be measured?**
- **What baseline information has been recorded?**

Centro Studi

The impact of the imported practice will be assessed at 3 levels: the impact for clients, for staff and for the organisation.

The impact goals on the clients will be:

- improving their analysis, self evaluation and self determination abilities;
- improving their participation and involvement in the assessment of the result; and
- increasing their possibility of impacting on the Centre's decisions and choices.

The quantitative aim is reaching 100 clients within 2010 and, at full capacity, about 200 clients per year in 4 Opera Don Calabria Centres.

For the staff the import of practice will mainly allow:

- a clearer perception of the criteria that must be considered as values for each person cared for; and
- acquisition of a culture of assessment and measurement to support continuous learning.

In terms of numbers, the aim is to involve 10 operators within 2010 and, at full capacity, at least 20 operators in 4 Opera Don Calabria Centres.

The impact on the organisation will be to:

- extend beyond the measurement of satisfaction for one single service by surveying global aspects concerning quality of life, even in terms of social balance (impact on the Community/ Society).
- implement organisational and strategic choices on the basis of evaluations answering shared criteria, even from the clients' point of view
- create a better culture of quality transversal to all services, on the basis of a common language.

A pre and post evaluation of impact will be carried out for these outcomes.

The impact on the daily work of the staff will be measured through an annual review (involving the staff themselves) in 4 Opera Don Calabria Centres in Ferrara, Verona, Rome and Potenza.

NLN

NLN will undertake an assessment of the Pilot to determine if it has met its objectives. This will involve comparison with some baseline information which is available from previous exit questionnaires and follow up studies.

The evaluation will include an assessment of results to determine the impact the Multi disciplinary team approach has on the Learners' quality of life; baseline information available from Individual Action Plan data; and Learner and staff reaction to the questionnaire.

5 Import of Balanced Scorecard Methodology from Cedar to Pluryn, URI and NLN

Importing Partners NLN, URI and Pluryn

Exporting Partner Cedar

Summary of Innovative Practice Being Imported:

- **What is being imported?**
- **Why is it being imported?**

The Cedar Foundation has used Balanced Scorecards for almost 2 decades. Cedar uses Scorecards as a tool for:

- Business planning;
- Communication; and
- Measurement and Management.

Scorecards cascade through the whole organisation and information is aggregated from all levels. Cedar's application of Balanced Scorecards is described in two Innovative Practice Guides—Management By Processes and Facts and Results Orientation.

NLN and Pluryn already have Balanced Scorecards in their organisations, but these are not being used to best effect. Pluryn's scorecard system is not seen as a business planning instrument nor as a tool for communication and Pluryn's departments do not use scorecards for day to day measurement and management. NLN's scorecard system does not readily facilitate the regular review of Key Performance Results (KPR).

URI decided to import Balanced Scorecard methodology to bring balance to outcome measurement, enhance management efficiency and effectiveness and bring a more unified approach to managing indicators. Cedar's approach also interested URI because of the links between the scorecard and ISO 9001:2008 systems.

Each of the organisations had clear goals / reasons for importing the practice.

URI

Using Balanced Scorecards URI's Vocational Rehabilitation Centre intends to improve its management strategy by:

- Formulating long-term objectives;
- Translating long-term objectives to short-term objectives and actions;
- Revising / reorganising existing quality indicators and developing new quality indicators;
- Organising quality indicators in the following areas: (1)Financial, (2) Customer (3) Internal processes (4) Organisational learning and growth; and
- Spreading management strategy to all levels and sites through cascade and aggregation.

NLN

An increased focus on outcomes requires an enhanced review system. Enhancement of NLN's current planning and review system will involve introducing:

- A broader range of targets;

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- Quarterly review of results against KPR targets using a traffic lights system; and
- Quarterly reports against KPR targets.

Pluryn

By renewing their Balanced Scorecard (both indicators and approach) Pluryn wants to make the Balanced Scorecard valuable and effective. They aim to establish a scorecard which is:

- An instrument that helps to measure and change policy whenever necessary (preventive and corrective actions) like a dashboard that gives a quick overview and that helps the organisation to be pro-active;
- An instrument that brings together the most important information;
- An instrument that is easy to fill in;
- A way to communicate with all employees about performance in a more structured manner;
- Informed by bottom up and top down input; and
- An instrument to make the organisation more focused.

Key words for Pluryn are Cascade and Aggregate.

Import Activities

Each of the importing organisations has undertaken / will undertake a range of activities, customised to meet their organisation's needs and context.

URI

- Initial benchmarking through EQUABENCH workshops and subsequent follow up.
- Adoption and approval of the concept by the top management of the organisation.
- Use of the Balanced Scorecard by the new Vocational Rehabilitation Centre Manager.
- Completion of a literature review on the Practical Implementation of Balanced Scorecards and analysis of key learning arising.
- Completion of substantial preparatory work with staff and management to facilitate the import.
- Provision of training / coaching on the model.
- Agreement of the 4 quadrants to be used and broadly the contents of these including indicators and measures.
- Accessing expertise and guidance from Cedar via a meeting with staff and managers to provide information and training.
- Implementing the Balanced Scorecard approach to the Vocational Rehabilitation Centre with due consideration to research findings and case studies (e.g. Roadmap for success - Orchardville Society). The implementation will be based on strengthening an existing tool – the Vocational Rehabilitation Centre's Table of indicators.

NLN

- Initial benchmarking activity through EQUABENCH workshops and subsequent follow up visits.
- Adaptation of Cedar's Traffic Light Reporting System to NLN 's structure.
- Introduction of the system to management and completion of the first quarterly report.
- Agreement of the system with NLN's senior management team.
- Communication and agreement with individual managers.

- Development of proformas and materials.
- Further development of IT information management systems.
- Improved speed of reporting.
- Increased awareness of the system throughout the organisation.
- Further enhance the speed and efficiency of Management Information.

Pluryn

- Initial benchmarking through EQUABENCH workshops and subsequent follow up contacts.
- Definition of the data that Pluryn needs for Measurement and Management by a focus group of staff. This data has to be readily available like a dashboard.
- Pluryn Management team briefing by a specialist from the Cedar Foundation in a half day seminar covering the following:
 1. The content of the Balanced Scorecard at Cedar (Which indicators are used, how and why are indicators chosen, how are indicators measured, is there one Balanced Scorecard or are there more, to what level are these Balanced Scorecards different.
 2. The way the Balanced Scorecard is used at Cedar (Cascade & Aggregate) the way teams are involved in the Balanced Scorecards, the way teams are informed on the results.
 3. The way the Balanced Scorecard is used by management (the use of indicators, how to react on red signs, the way the Balanced Scorecard is linked to the planning & control cycle).
- Amendment of Pluryn's Scorecard objectives and indicators by key staff using the Delphi method. This process will be finished before the start of the next planning & control cycle: 1-1-2011.
- Improve the link with annual planning by translating the goals of the annual plan into indicators. This will be completed by the management team, supported by staff members after finalising the plans for 2011.
- Development of an Excel Scorecard proforma (2 different scorecards for 2 parts of the organisation) by the management support department.
- Communication of the Scorecard throughout the organisation via meetings with the management team in the first quarter of 2011.
- Collecting and collating data for the new Scorecard by management support at the end of the first quarter of 2011.

Evaluation of Impact

- **How will impact be measured?**
- **What baseline information has been recorded?**

Each organisation has a specific set of criteria against which the impact of the imported practice will be measured.

URI

- **Enhanced Vocational Rehabilitation Centre quality indicators management** - this will be evident in the comprehensiveness of indicators, staff ownership and participation in setting indicators, measuring and reporting of Vocational Rehabilitation outcomes;
- **Broadened client focus in process and outcome measurement** - introducing measurement of impact of Vocational Rehabilitation on users' perception of quality of life

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(imported from CRPG), Empowerment (Vrij Baan method – imported from Pluryn) and the systematic use of existing tools, measuring work functioning (Employment problems assessment scale and Self/Assessment of work behaviour).

- **Stronger evidence of results orientation and continuous improvement** – this includes results in terms of rehabilitation outcomes and collaboration with employers. Such evidence better positions URI for negotiating with funders on the level and extent of service provision.

NLN

NLN will measure impact through management review and adaptation of the planning system. Baseline information for comparative purposes is available through current planning and review systems and outcomes. Specifically impact will be evaluated in terms of:

- NLN's enhanced ability to respond to a changing environment;
- The quality and relevance of reports;
- Management review of change; and
- The next business excellence assessment which will ascertain independent assessors' view of the improvement.

Pluryn

Pluryn will deem the import to be successful when:

- The Balanced Scorecard is renewed with indicators from the contracts and from the annual plan.
- The new Balanced Scorecard is operational (filled in and used).
- The teams are aware of the content of the Balanced Scorecard.

The first two bullet points will be evaluated by looking at the content of the Balanced Scorecard. The deadline for the introduction is to be fixed by the management team. The third bullet point will be evaluated by interviewing team members, 6 months after the introduction.



EQUABENCH—Benchmarking European Excellence

Continuous Learning, Innovation & Improvement Innovative Practice Guide

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