

THE AGILE UNIVERSITY

CASE STUDY

UNIVERSITY OF EAST ANGLIA STRATEGIC CHANGE

The Strategy Engagement Process



The Context & Need

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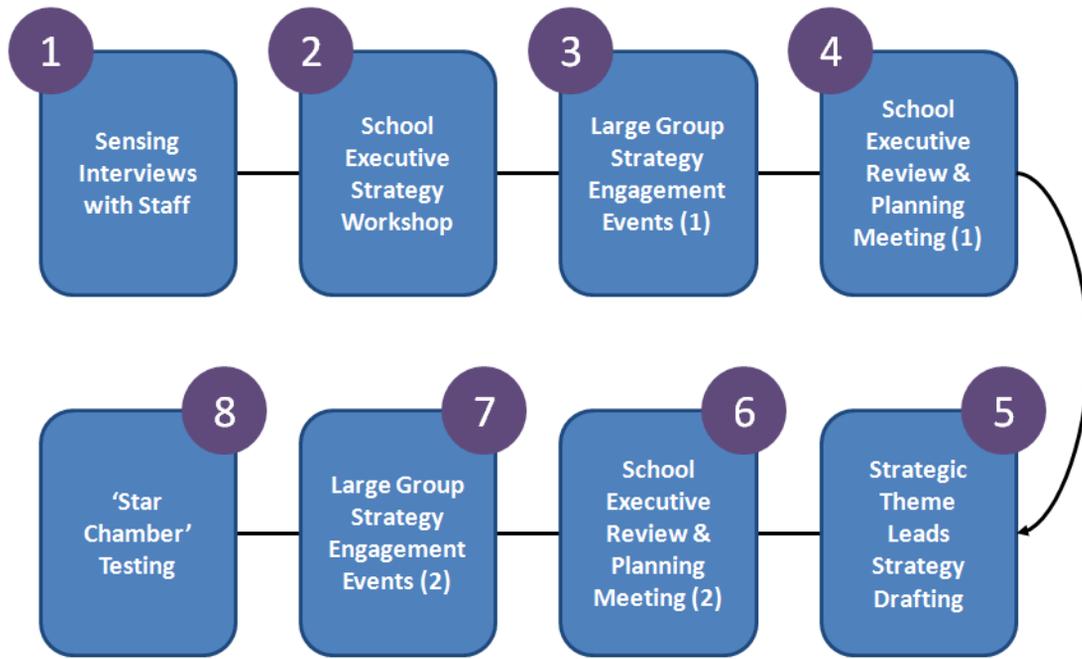
On appointment, in 2010, the new Head of the School of Nursing and Midwifery (SNAM) initially devoted time to better understand the strengths and weaknesses of the School. This involved meeting members of staff, students and senior University leaders. Meetings also took place with key NHS partners in the region who provided the contracts that underpinned substantial amounts of the School's income. This gave a clear overall picture of the leadership challenges and opportunities. As a result of these discussions and subsequent analysis, together with the development of a vision that matched the potential observed, the Head of the School of Nursing and Midwifery concluded that a more strategic and connected approach would be required if the School was to:

- Better align with the wider University's world-class research agenda
- Diversify and increase its income streams
- Improve efficiency and effectiveness
- Develop its regional partnerships with the NHS
- Improve the student experience

Elementa Leadership was engaged to assist the Head of School to develop the School's first formal strategic plan. The Head of School was clear that the plan had to be developed through the active engagement of all staff and stakeholders such that it achieved widespread legitimacy and was informed by the best knowledge available. The plan would need to clarify and identify School purpose and values, core strategic themes, goals, objectives and key performance indicators as well as a detailed year one action plan.

The Solution

The solution, co-created with the School of Nursing & Midwifery is described below:



Stage One Sensing Interviews with Staff

These combined individual and small focus group interviews to explore and understand the perceptions of staff regarding the purpose and efficiency and effectiveness of the School and their thoughts and feelings on being a part of it. A short report was produced summarising key themes and issues.

Stage Two School Executive Strategy Workshop

This workshop sought to facilitate the development of an agreed process that would deliver a new SNAM strategic plan. It also sought to clarify the leadership role and behaviour of the School Executive Group as this plan was developed and implemented.

The content included:

- The 'big picture' (post Browne Report and proposed Coalition government NHS reforms)
- Appreciating SNAM strengths and areas for improvement
- Clarifying the elements of a high performing organisation and a high performing 'top team'
- Agreeing an engaged strategic planning process and School Executive role/s in this
- Reviewing and developing an initial draft of SNAM vision and mission and emergent strategic themes

The Solution

Stage Three Large Group Strategy Engagement Events (1)

A series of large group events for all staff and key stakeholders were designed and implemented. The intention of these was to actively engage people in the development of the new plan. These events engage large groups of people in strategic dialogue, possibility building, knowledge sharing and collective problem solving. They are a valuable alternative to a 'command and control' response to complex organisational challenges and a way of dipping in to the vast sea of human potential, creativity and wisdom that exists in and around all organisations and of changing the nature of organisational conversation. Having all stakeholders together in the same room creates a broad base of knowledge, improves cross-functional working, and maximises "whole system" learning and ultimately delivers a workable plan. There are no management directives or motivational speeches. In their place are open conversations and collaborative working. As a result of creating the plan, people more readily commit to implementing it.

The events asked people to initially focus on 'appreciating the best of SNAM'. The emergent strategic plan was then presented and feedback and improvement suggestions were invited. The events catalysed a high quality and energetic dialogue in which people felt they really had a voice. They enabled trust to build between School Executive, staff and stakeholders and fostered a sense of community. Importantly, they generated much valuable feedback and many improvement suggestions. The events were attended and actively supported by both the Dean of the Faculty of Health and the Vice-Chancellor.

Stage Four School Executive Review & Planning Meeting (1)

The purpose of this planning and review stage was to review the feedback and emergent themes and issues emanating from Stakeholder and Staff Engagement Events and to clarify and define improvements to the emergent plan.

Stage Five Strategic Theme Leads Strategy Drafting

The School Executive had appointed individuals to take the role of 'Theme Lead' for each of the strategic themes: World-Class Research, Financial Sustainability, Teaching and Learning, Infrastructure and Administration, Networks and Connections, Our People and Responsiveness through Innovation.

The role and responsibilities of the Strategic Theme Leads was:

- To steward their agreed strategic theme
- To work with others to define the goals that should underpin their particular strategic theme

The Solution

- To work with others to define the key performance indicators associated with each of the goals
- To work with others to define year one SMART objectives that will deliver the goals
- To work with others to define specific actions that will deliver the year one objectives
- To share with the Senior Leadership Group as a whole, their emergent plans in order that duplication, crossover and the need for shared ownership of goals and objectives can be identified
- To work with others to monitor the progress of the strategic themes as a whole and in particular its associated goals and key performance indicators and to report back on progress using the agreed 'dashboard' methodology

The Strategic Theme Leads developed emergent plans 'offline' with coaching and support from the Head of School and coaching and guidance from Elementa Leadership.

Stage Six **School Executive Review & Planning Meeting (2)**

This meeting involved each Strategic Theme Lead in presenting their emergent plan to the whole School Executive. Each Theme Lead received feedback and improvement suggestions which they reflected on before making any changes. This meeting also allowed the School Executive to better assess interdependencies and any duplication between plan elements and to assess overall cost and resource implications associated with the detailed year one plan.

Stage Seven **Large Group Strategy Engagement Events (2)**

This second set of large group engagement events were designed to give both staff and stakeholders feedback on the latest version of the strategic plan, the use made of feedback from the initial events and to invite further improvement suggestions that would lead to confirmation of the final version.

Stage Eight **'Star Chamber' Testing**

Strategic Theme Leads incorporated appropriate improvement suggestions from the second set of large group events before presenting their final strategic plan versions to the Head of School and School Financial Manager for ultimate approval.

The Result

The process successfully delivered a new 5 year plan for SNAM with a detailed year one plan with clear priorities, that achieved wide legitimacy within the School. It also received the endorsement and support of the Dean of the Faculty of Health and the Vice-Chancellor. The approach adopted challenged assumptions about what was desirable and indeed possible and generated an enthusiasm around the new SNAM vision which promoted the School as an international, national and regional leader in its field. It also helped to forge a different kind of leadership in the School, one that was more outward looking, more confident in its role of engaging with staff to liberate discretionary effort, and unashamedly more research centred and performance orientated. The gains from this approach were both strategic and cultural.

Professor Val Lattimer, Head of School, who had initiated and sponsored the approach describes its impact:



“Working with Elementa Leadership has been key to our success in developing a new strategy for the School which I feel confident will enable us to realise our potential and to be in tune with the university’s corporate plans, our many external partner organisations, our students and service users. In the last year, Elementa have brought us a range of strategies through which we have been able to realise our wish to engage with staff and to hear and understand their views. Elementa’s knowledge and critique of the HE sector, the wider economy and the world of health care together with experience of working with large organisations in other sectors has won the confidence of the School senior team and academic and support staff alike.

At a practical level, Elementa were highly organised and developed the design of engagement events in a consultative way. Valuable written feedback from events was returned within two to three working days, in a format that could be circulated and enabling momentum to be sustained. We have since taken this work further to develop an improved organisational design for our academic structures and processes that will support implementation of the strategy. “

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