

Process Management to Deliver Policy and Strategy

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Development



Process Management to Deliver Policy and Strategy



- ISO 9001:2008
- Balanced Scorecards



Why Manage Processes?

“Brilliant process management is our strategy. We get brilliant results from average people managing brilliant processes. We observe that our competitors often get average (or worse) results from brilliant people managing broken processes.”

-A senior Toyota executive



What is a Process?

- A series of steps to provide a product or service
- Converts *inputs* into *outputs*
- *Inputs* – materials, equipment, supplies, people, budgets, information
- *Outputs* – service provided, report produced, invoice paid, unit manufactured

inputs → **Process** → *outputs*

Resources



Results



Process Management

**Policy and
Strategy
Determined**



Process Management

**Policy and
Strategy
Delivered**

If you don't manage your processes,
you can't claim credit for the results



Process Management to Deliver Policy and Strategy



Management by Process and Facts

- Management by Process – How – ISO 9001:2008 Quality Management System
- Management by Facts – What – Balanced Scorecards & Traffic Lights



Management by Facts - What



Management by Process

How



Delivering Policy & Strategy by Managing Processes & Facts



- Scorecards = cascading plans = people know what they need to do
- ISO 9001:2008 QMS = clear procedures & instructions = people know how to do things



Starting Point

EFQM Feedback and Commitment to
Continuous Improvement



EFQM Excellence Model

INNOVATION AND LEARNING



ENABLERS

RESULTS



EFQM Feedback 2003



‘The key processes in respect of the main services are defined in terms of service development, service delivery and evaluation. As such it is not clear who owns these processes and where responsibility lies for process management, improvement and the resolution of interface issues.’



How we Responded

- Benchmarking – what were other organisations doing?
- Mapping high level processes in simple terms
- Identifying and implementing a process management system
 - * manage the consistent delivery of services
 - * ensure ongoing review and improvement



In Summary....



Very complicated,
poorly defined,
beautifully
presented process
maps

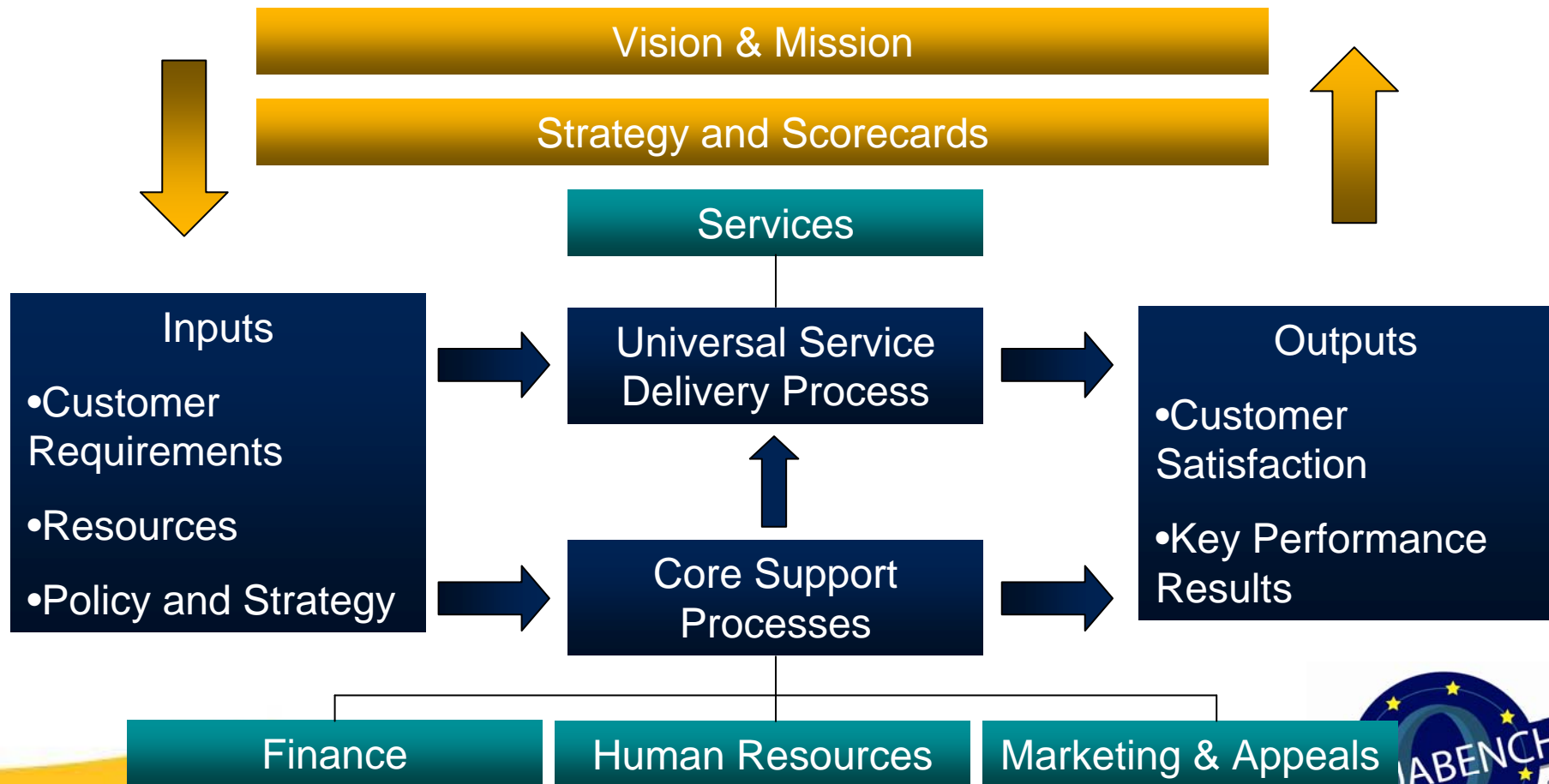
Preserved in filing cabinet

Clear, simple process maps
and underpinning
procedures

Actually used



The Cedar Foundation's Process Management System



Universal Service Delivery Process



Entry

Assessment

Intervention

Review

Exit

Post Exit

Generic, Service and Departmental Procedures, Forms and Guidance



FS 45707



Universal Service Delivery Process Training Services



Entry

Receive Referrals and Process
Admissions

Delivering Trainee Induction

Intervention

Arranging Trainee Transport

Programme Delivery

Monitoring Trainee Attendance

Home Visits

Assessment

Administering Vocational
Profiling

Developing & Amending Trainee
Action Plans



Universal Service Delivery Process Training Services



Review

Review of Trainee Programmes

Exit

Progression from Service
Suspension from Service

Post Exit

Record and File Retention
Post Exit Monitoring



Core Support Processes – Human Resources

Entry

Employment

Exit

Post Exit



How did we get there?



What does the system look like?

- Scope – covers all services and departments and locations
- Generic documents (TCF, TCF/HR and TCF/FD)
- Service specific document

EFQM Feedback 2007



‘Cedar operates a comprehensive process management system which is extensively deployed throughout the organisation. Process ownership is clearly defined within the senior management team. Cedar manages and controls its processes as part of its ISO 9001:2000 Quality Management System. The collection and application of fact-based information is also extensively deployed in the review and improvement of processes and procedures.



Improving Performance



Designing a Process Management System



- KISS your processes
- Don't re-invent the wheel
- Use your internal expertise
- Be prepared to change



Benefits of Process Management

- Process ownership
- Clarity of Purpose
- Process agility
- Staff Training Tool
- Service continuity
- Preserves intellectual property
- Minimises key person dependency
- Internal benchmarking
- Continuous improvement



Process Agility



Process agility creates an organisation responsive to changes to its market and environment



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What is the Balanced Scorecard?



A strategic measurement and a strategic management system which enables the reconciliation of traditional financial measures with more forward looking non-financial measures.

- Business Planning Tool
- Communication Tool
- Measurement Tool
- Management Tool



Scorecards Are Use To



- Clarify / Update strategy
- Communicate strategy
- Align Unit / Individual Goals
- Link Strategy to Budgets
- Identify / Align Strategic Objectives
- Conduct Performance Reviews to Improve Strategy



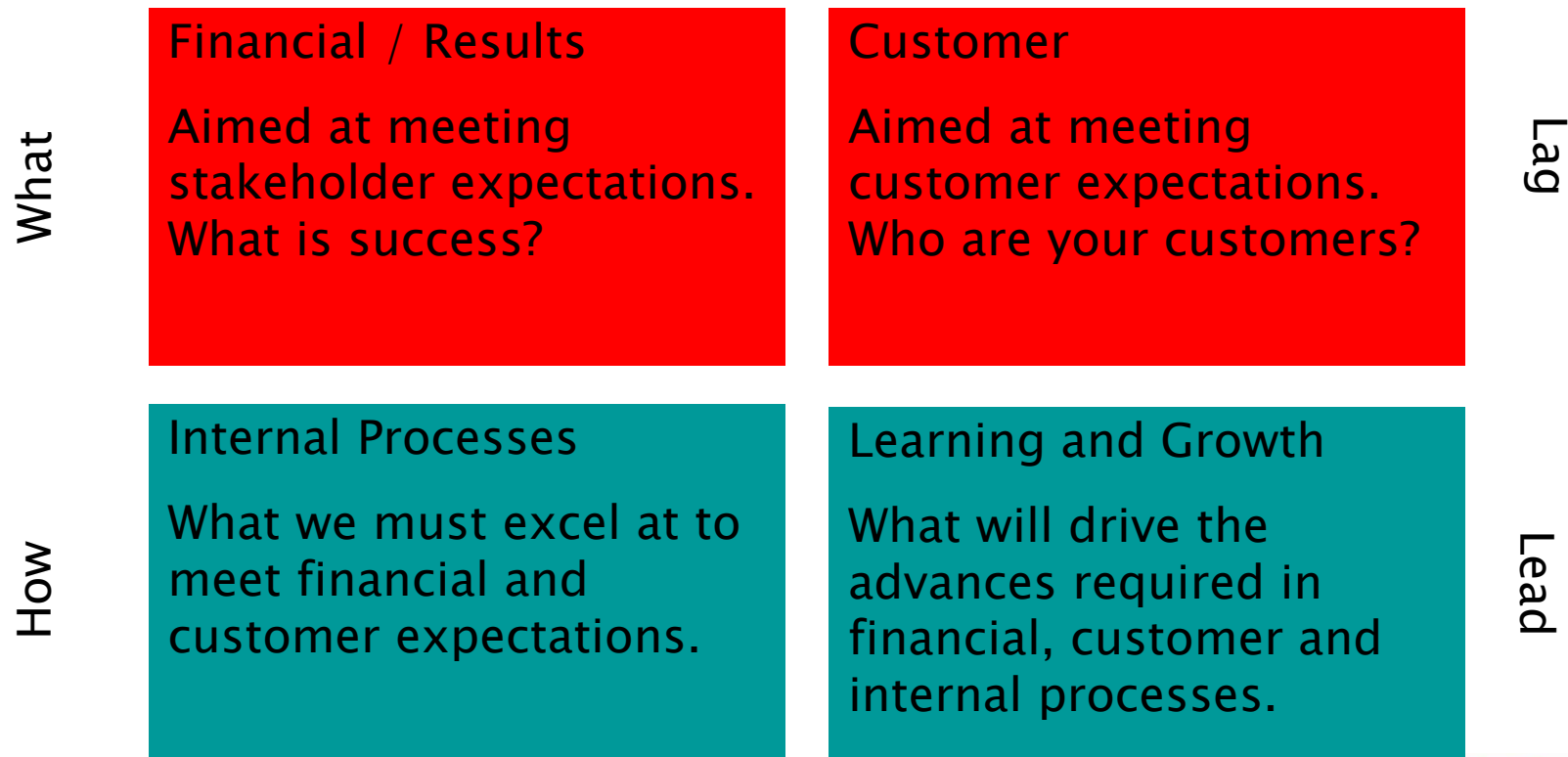
The Balanced Scorecard



A planning tool to assist in the formulation of long term strategy and translating this into short term objectives and actions



Four Quadrants



Cascade & Aggregation



Organisational Scorecard

Objective	Measure	Performance Target
Provide quality services to all our customers that empower and support them to be fully included in their communities as equal citizens	No. of innovative and inclusive programmes & services delivered by Cedar	71
	No. of Service Users	1 400
	Level of Service User and Purchaser Satisfaction	98% Service Users 1 00% purchasers



Service Level Scorecard

Objective	Measure	Performance Target
To provide quality services which empower and support service users to be fully included in their communities	Outcome Targets VR & CM	% Positive Outcomes % Employment % Further Training % Social Outcome
	Outcomes Floating Support	% Positive Outcome
	Number of Service Users (ESF)	138



Vocational Rehabilitation Officer - Work Plan

Objective	Measure	Performance Target
To maintain optimum programme occupancy	Programme Occupancy	20

Work Plan – Employment Development Officer

Objective	Measure	Performance Target
To complete quarterly reports on activity within the Employment Development Programme	Quarterly Activity Report completed to schedule	Report completed 3 weeks before period end
To maintain the optimum number of trainees within the Employment Development Programme	ESF Contract Compliance – Training Hours & Occupancy	Trainee activity = 300 hours per week 30 trainees on placement



Work Plan – Deputy Head of Service



Objective	Measure	Performance Target
To provide relevant information to the Head of Service to facilitate completion of quarterly and annual ESF Returns	Quarterly ESF Reports completed	Information to Head of Service within 1 month of period end
To monitor ESF contract compliance taking remedial action as required.	ESF Contract Compliance – Training Hours & Occupancy	95% compliance training hour targets 80 trainees



Service Level Scorecard



Objective	Measure	Performance Target
To secure funding to sustain and develop all Training Service activity	Funding secured from ESF and match funders	100% funding secured
	Compliance with all funding claim procedures / deadlines	Completed within 1 month of period end
	BSP Training Hours / Occupancy	95% compliance – hours and 100% occupancy



Organisational Scorecard

Objective	Measure	Performance Target
Secure funding to ensure the continuance and future development of sustainable services in line with the Foundation's strategy	Incoming resources	% increase in income
	Compliance with all legislative & Funder Requirements	100%
	Full cost recovery	<ul style="list-style-type: none"> • LO = % • C&YPS = % • TS = % • BIS = %



Tips

- Scorecards do not come in a tin
- Don't build a scorecard unless you have a clear strategy
- The value of the scorecard is directly related to the engagement of the team
- Measure the right things
- Less is more
- The scorecard is an ongoing process not a 'one time' event

Tips

- Hold people accountable for results
- Don't get bogged down in detail
- Don't place the importance of the model over the importance of the objective

Benefits

- Balance
- Measures
- Cascade
- Aggregation
- Clarity
- Alignment



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Thank You

www.cedar-foundation.org

