

Age UK East Sussex - Management Team Development through Strategic Planning

The organisation

Age UK East Sussex works to enhance the quality of life of older people in East Sussex.

The need

AGE UK East Sussex was going through a period of internal investment, reconstruction and renewal that had a significant impact on the organisation's effectiveness. A new management team lead by Steve Hare, the Chief Executive was established and the need for a new strategic plan identified. At the same time, Steve wished to embark on a programme of development for the management team.

What we did

Note from Jacqueline: I usually write the case studies myself with approval from the client, however Steve very kindly wrote a reference that says it better than I could! So here, in Steve's own words, is what we did.

I asked Jacqueline to support Age UK East Sussex in the development of its strategic plan and to support the development of a recently created and somewhat disparate Senior Management Team. The work took place over 10 months and ended with the successful sign-off of the strategic plan by our board of trustees. The process was challenging in that, on Jacqueline's (correct) advice, we combined the involvement of the management team in process of strategic planning with the development of leadership development and team building. The stages/steps highlighting Jacqueline's input included:

- Facilitated workshops with discussions and exercises with the management team to develop a new Vision statement, to refresh the mission statement, and to identify strategic aims for 2012.
- The provision of Frameworks for the analysis of strategic positioning, analysing and communicating with stakeholders.
- Facilitated workshops with discussions and exercises with the management team to identify team priorities, and review results staff /volunteer surveys on priorities.
- Facilitated workshops with three separate groups of staff and volunteers on organisational vision, mission, strategic goals and priorities.
- A facilitated joint management team and board of trustees away-day session on strategic plan priorities.

At the beginning of the process Jacqueline gave guidance, advice and framework models for understanding how vision/mission/strategic aim and goals relate to each other (this was returned to at key stages in the later process). Also at this early stage a template business plan gave a structure to its development and delivery. This was initially documented by Jacqueline, but at the earliest appropriate opportunity ownership/control of this was handed over to the team (through me as the CEO).

Benefits

During the process Jacqueline maintained clear, positive and effective communication with me to review and share progress to date, and to ensure that each step had an aim and (SMART) objectives. Contact with management team members was via a planned programme of face-to-face meetings and telephone support outside of facilitated sessions. Each team session/workshop was fully prepared and all parties were briefed beforehand.

Throughout the project Jacqueline delivered:

- Regular reports on detailed activities and costs/budgets
- A rolling actions log with clear identification of actions/named responsibilities/ timescales/successes.
- Timely and appropriate resource materials and training elements to support individual and management team learning (e.g. on giving briefings, managing change).
- During each session Jacqueline maintained a calm, friendly, and professional position. She quickly understood the personalities and team dynamics involved. In what at times was a challenging and difficult process, Jacqueline was able to work with these effectively- ensuring progress was made and that team building and leadership development processes moved forward appropriately.
- The strategic plan was successfully launched and Age UK East Sussex made good progress while at the same time managing significant change in the social care sector. Since this time I have maintained regular informal contact with Jacqueline – swapping updates and information outside of an engaged consultancy relationship. I have recommended her to other voluntary and public sector partners, and would happily do so again. I would also have no hesitation asking Jacqueline to support Age UK East Sussex in the future where this should be needed. I am very pleased to provide a reference for Jacqueline Hill and would highly recommend her.

Steve Hare, CEO, Age UK East Sussex