



# BUILDING ACHIEVERS



PROVIDING THE RIGHT TOOLS FOR  
IMPROVEMENT



South Taranaki District Council  
Real Energy



# THE NEED, THE EXPECTED BENEFITS AND THE LINK TO COUNCIL'S VISION



## Introduction

The People Development Review Team was responsible for coming up with new ideas for a range of processes around the management of people. The Team made a number of changes to policies. It created new policies for succession planning and employee retention. It overhauled the induction process for new employees. The Team's greatest focus, however, was on reviewing the performance management coaching tool used by the organisation called Building Achievers (BA)

## Background

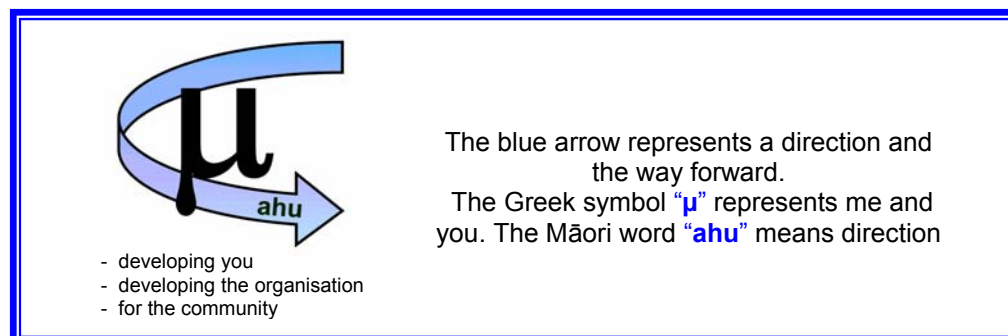
In early 2005 The Chief Executive and Management Team set up a number of cross -Group review teams. One of these, The People Development Review Team, was asked to investigate, recommend and manage a range of issues relating to staff development.

The scope of the project was to review the existing People Development Programme and specifically:

- ✦ The performance management coaching tool used by the organisation called Building Achievers (BA);
- ✦ Core training
- ✦ Personal development;
- ✦ Succession Planning;
- ✦ Induction.

The Review Team delivered on all of the above, but the focus of this report is on the Building Achievers process.

The original purpose of the performance management system was encapsulated in the logo, as depicted below:



## The Need

The performance management system and Building Achievers folder for each staff member had been in place for over three years. The folder was divided into ten sections that covered several things including, mission statements, vision statement for customer service, business plans, service level agreements, job description, performance continuums, key result areas, training plan and evidence of performance. It was originally designed after several workshops with employees in 2000 to develop a customer service vision, identify key customer service skills and incorporate a behavioural based performance system. The aim was to provide an employee with all the information they needed about their job.



Based on its data gathering and anecdotal feedback, the review team believed that the old Building Achiever process was no longer meeting the organisation's development needs. This in turn meant that the organisation was not meeting its goals.

Issues that the team identified included:

- ✘ The emphasis on marking an "x" on a continuum for an attitude or skill was not addressing job performance or expectations;
- ✘ The timing of the six monthly coaching sessions and the requirement to align these to other planning systems;
- ✘ Appropriateness and order of the various sections within the BA folder;
- ✘ Over emphasis on completing the *performance skill continuums* during reviews, this had become repetitive and was serving little purpose for many employees;
- ✘ Poor links to Business Plans, Long Term Council Community Plan (LTCCP) and meaningful Key Result Areas (KRA's);
- ✘ Over complex and overlooked training plans, with inadequate training needs analysis over time;
- ✘ Need to better align the process to new customer service requirements;
- ✘ Re-training and re-education of supervisors/managers/employees on performance management, training needs analysis and on-job training.

## The Expected Benefits to the Working Environment and links to the Council's vision

The re-vamp of the Building Achievers documentation (see sample folder provided) has created a new slim-line booklet that is not generic but individually tailored for each employee. Based on job specific requirements and organisational requirements the documentation gives the employee and manager an integrated and streamlined user-friendly way to assess performance, identify any gaps and specify relevant training.

The new BA process and training cycle will change the focus from completing a training checklist to exploring training needs with the employee prior to developing a training programme. The changes to the timing of the BA cycle will enable the development of the training programme to follow a BA session, creating a high performing organisation where the training process is more important than the training content. This change to the training cycle also fits with the most recent research which indicates that it is the manager that has the most influence on the effective transfer of training by *warming up* the participant before the event and *following up* with the participant after the event.

An addition to the Building Achievers booklet includes the ability for any employee to nominate themselves for leadership development. This supports and enables the EMT's initiative for the organisation to be a place where "courageous leadership becomes the norm"



Providing the right tools for improvement and changing the Building Achievers process and documentation has created a work environment that moves the organisation from good to great, “developing the individual... developing the organisation... for the community...”.



## Project Management

The People Development Review Team followed a strategic planning methodology to review, investigate, recommend and manage a range of issues relating to staff development. It included these steps:

### A review of existing practice and research into best practice

A discussion paper provided the Review Team with an overview of the formulation of the existing practices that had been in place since 2001.

Members of the Team also provided input via background papers, research information and direct feedback. The Team reviewed current best practice models for training, and research into elements of people development, such as retention and succession planning.

Members of the Team also attended a seminar on induction practices.

### Setting objectives

The Review Team were given the scope and direction for the project directly by the Chief Executive. The Team was made up of representatives from across the organisation and an independent view was sought from an external consultant in the initial research and analysis stage.

The Review Team set objectives for the project through the development of an *ideal* organisation in terms of people development and the completion of a strategic overview/vision. Part of this phase of the project was to analyse and identify the gaps between the ideal and the current practice. This involved describing the issues and making recommendations to the Executive Management Team (EMT) on the principles to address these gaps and issues.

### Links to other Council systems

One of the criteria for the success of the project was to review and clearly show linkages to other Council systems. These linkages are captured in a diagram that is available to every employee as part of their Building Achievers folder. It shows the links between the budgetary cycle, planning cycle (Long Term Council Community Plan and Business Plans), the performance system and the subsequent training and development plan cycle.

### Implementation and Communication

The implementation phase involved checking each specific area of the people development programme for fit with the strategic vision. Mechanisms and tools for each area were reviewed and changes made to both content and format. The changes impacted on various HR policies, the induction process and the performance management system. The implementation phase included a comprehensive communication strategy.

## Communication

### Obtaining feedback, pilot trial and review



This project involved and affected everyone who works for the Council. The key stakeholders included the Executive Management Team, the unit managers, the DAG Group (Development Advisory Group, an independent group of 6 people who are selected from staff nominations and represent the four Council work groupings) and the employees.

The Team provided the EMT with a formal report and presented its findings and recommendations to them. EMT approved the recommendations and the Team implemented the changes. The Team then formulated a communication strategy. The timing of this was planned so that the changes to format and content were described initially to the DAG Group for their direct input and feedback, and then to all employees, via presentations, in early May. The June performance management session, has been treated as a pilot trial, and every employee has been encouraged through a specific feedback form to comment on the new performance management system and any other of the associated changes. The four presentations in May included a step by step walk-through of the new Building Achiever folder. Additional sessions were held in satellite workplaces, and individual sessions were held with any employees who had been absent.

Once the pilot trial is over, and the feedback has been analysed to check for changes then every employee will receive additional information about performance management principles, assessing training needs, and constructive feedback.

The process described above demonstrates the participatory approach taken to introduce and communicate the changes involved with this project.

### An Innovative and Original Idea

The new **slim-line** BA folder is innovative and original because of the following reasons:

- ✘ Streamlined process making it easier to complete, more efficient and effective by providing a user-friendly way to assess performance, identify any gaps and specify relevant training on one page;
- ✘ Provides strong links to business plans and organisation goals, training plans and training processes;
- ✘ Tailored specifically to each individual position by incorporating job specific key result areas extracted directly from each job description;
- ✘ Has captured and linked components of the Job Evaluation System as well as relevant competencies from the previous BA document;
- ✘ Re-emphasis on customer service by including this as a generic key result area for every position;
- ✘ Creates relevant discussion on key results areas and results in a better understanding and stronger accountability for both Managers and employees;
- ✘ Provides a diagrammatic example of how the BA process fits into the whole organisation's planning cycle.
- ✘ Core training is described with a simple registration system;
- ✘ The system is open and transparent as it allows for both employees and managers comments to flow through the reporting lines;
- ✘ Incorporates the latest up to date best practice for the effective transfer of training;
- ✘ Each employee can record additional contributions they make to the organisation, provide feedback on their supervisor or manager, indicate opportunities they would like to have for the following six months, and fill in a self-nomination form for leadership development.



An ongoing commitment to the people development programme will be the delivery of specific training for managers on on-job training, training needs analysis and performance management principles. Employees will also receive a half day programme to assist them to get the best from their Building Achievers interview including how to seek and receive feedback and giving upward feedback.



## Success of the new Programme

Already feedback forms are reflecting the wide acceptance of the employees to the changes with comments such as:

“A greatly improved format. Key advantages are, the clear link to business planning and how each position has a role in this for the organisation. The ability to determine areas of a job description where emphasis is in practice and a mechanism to correct this if appropriate.”

“The new format is great, I feel it is more personal to my position and certainly a great deal easier for me to put comments – more user-friendly. Well done, I enjoyed my session with my manager”

“This is a huge improvement on the previous BA process. I particularly like the way that it is now not constrained and prescriptive. Staff have been empowered to use the process in a way that they feel best suits them as an individual. This approach means that staff need to think for themselves rather than being blindly led. This is what Building Achievers is all about.”

“I found that that I had my most fruitful discussion ever with the new set up. I liked the fact that the forms are tailored to my job description which resulted in the discussion being so relevant and helpful”

“It was good to see if I am meeting the goals set in my job description. It was a lot more relevant than the last BA round and I think it actually took less time and added less stress. Well done.”

“A much more user friendly document. I feel it is much more about “me”.

“In the previous process the continuum “rating” forced you to explain why you considered a person was at a particular level. The new process means as a manager that you need to be much clearer on your expectations – I had to do more preparation to ensure issues were addressed – this is not necessarily a bad thing. On the whole I think the new process is a very positive move that has been well implemented. The “bugs” are job description related and picking these up is a positive in itself.”

## A Sensible Thing to do

The review was a good and sensible thing to do because the last review of the process had occurred in 2001 and after that length of time it was an opportunity to compare current practice with best practice. A commitment has been made within the Business Plan of the HR Unit to review all HR practices again within a two year time frame.

New research into training and development had produced interesting evidence about the influence of the manager on the learning process and the BA documentation provided manager's with a new and effective tool to do this.

It was also an opportunity to develop a tool within the overall people development plan that would fit the strategic theme of continual improvement and deliver on Council's mission to *“lead with fairness and integrity, and work to inspire a vibrant and caring spirit of community, while remaining an efficient and sensitive provider of services”*.