Case Study 3

For

Case Study 3
16/05/2006

RapidBI
KNOWLEDGE • UNDERSTANDING • ACTION
Setting the scene for the review, who was involved.

The following Board & Managers were involved in this Review:

<table>
<thead>
<tr>
<th>BOARD</th>
<th>MANAGERS</th>
<th>OTHERS</th>
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</thead>
<tbody>
<tr>
<td>J Jones</td>
<td>R Davis</td>
<td>Other</td>
</tr>
<tr>
<td>P Scott</td>
<td>P Hollie</td>
<td></td>
</tr>
<tr>
<td>D Brown</td>
<td>D Francis</td>
<td></td>
</tr>
<tr>
<td>M Williams</td>
<td>A Cross</td>
<td></td>
</tr>
<tr>
<td>G Battern</td>
<td>D Owen</td>
<td></td>
</tr>
<tr>
<td>M Harris</td>
<td></td>
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<tr>
<td>G Dee</td>
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The review also includes data from:

- Staff
- Suppliers
- Customers
The Future

The results from the BIR process need to be considered in the context of where the organisation wants to go.

The vision of the company according to the:

**BOARD**
- To provide an improved service to our customers & to train & develop the staff who work for the organisation.
- Caring for carers & looking after the frail & elderly in their own homes.
- To be able to finance offer every carer in the city & short break service.
- Carers in the city have access to respite when they need it.
- A city where everyone can access a short break or domiciliary services in their homes when needed. To relieve carers.

**MANAGERS**
- To relieve carers.
- To provide a service to clients
The SWOT gives us an insight to where the key responders are coming from and what their thoughts are on key issues.

People completing this review described the following:
B = Board, M = Managers, O = Others

**STRENGTHS**
High quality of service to customers, (B)
on-going staff development & good management/director team. (B)
Well-trained staff & competent management. (B)
Strong working board of directors. (B)
Have provided our service since the early 1980's. (B)
Knowledge of business. (B)
Manager. (B)
Good management team. (B)
Well trained certificated staff have provided a service to carers over 2 decades. (B)
Committed staff. (M)
Track record. (M)

**WEAKNESSES**
Difficulty in finding staff, need to deal with changing legislation & shortage of new people for management team. (B)
Coping with applications for staff but not able to offer regular work as social work is not core funded. (B)
Not good at promoting ourselves due to the way we are funded. Most of our staff are 50 year young. Not clear where our service fits. (B)
Ageing staff profile. Premises - Low profile. (B)
Lack of core funding. Unable to guarantee hours to staff. Difficulty in recruiting staff. (B)
Staff (M)
Skills of the Board (M)

**OPPORTUNITIES**
Opportunity to offer service to more customers, to develop new services/offerrings & to train staff to take a wider range of work. (B)
Business plan in place. (B)
Looking for new work from other sources. (B)
Be clear about the service we offer. (B)
Opportunities to re-promote our service. (B)
The SWOT gives us an insight to where the key responders are coming from and what their thoughts are on key issues.

People completing this review described the following:
B = Board, M = Managers, O = Others

**OPPORTUNITIES**
- Work in partnerships & networking. (B)
- Contracts with Local authorities. Project Funding. (B)
- Partnerships with others. (B)
- Widen our marketing. Extend business consult to this end. (B)
- Backing from management Board. (M)
- Partnering with other agencies (M)

**THREATS**
- Other organisations offering similar services, work force ageing - lack of replacements & changes to legislation - more bureaucracy. (B)
- Local authority take the clients first. No core funding. (B)
- Staff cannot be guaranteed hours. (B)
- Social Work. (B)
- Private organisations. Some voluntary providers who offer like service. (B)
- Competition. National re-organisation. (B)
- Manager leaves. (B)
- Difficulty in retaining staff. Increasing difficulty in fundraising. (B)
- Local authority (M)
- lack of funding (M)
- Staff shortages (M)
When completing this section of the review, participants were asked to rate the performance of the organisation and give a reason for the score. The reasons given are presented here.

B = Board, M = Managers, O = Others

### FINANCE
- Good financial position. (B)
- Good level of financial control & reporting. (B)
- Statement given out at every monthly meeting. (B)
- Have to be accountable to our funders. (B)
- Previous track record. (B)
- Work needs to be increased on call-off contract. (B)
- Maintaining viability. (B)
- Budgets tight (B)
- Funding from local government (B)
- Break/ principles ensuring sufficient funds for contingency (B)

### MARKETING
- Lack of funding. (B)
- Lack of expertise. (B)
- Are known to many areas. (B)
- Will endeavour to accommodate help asap. (B)
- Have no information available. (B)
- Current low profile. Need to strengthen relationships with social work departments. (B)
- Employed business consultant to assist this process. (B)
- Good publicity material (B)
- Brochures (B)

### OPERATIONS
- Dedicated staff. (B)
- Good procedures & controls. (B)
- Can produce staff quickly. (B)
- Have Quality Assurance in place. (B)
- Operates a quality system (B)
- Operational procedures & processes well embedded. (B)
- Policies & procedures in place. Business plan. (B)
When completing this section of the review, participants were asked to rate the performance of the organisation and give a reason for the score. The reasons given are presented here.

B = Board, M = Managers, O = Others

<table>
<thead>
<tr>
<th>OPERATIONS</th>
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</thead>
<tbody>
<tr>
<td>Quality Assurance system in place. (B)</td>
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<table>
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<tr>
<th>PEOPLE</th>
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<tbody>
<tr>
<td>Well trained staff. (B)</td>
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<tr>
<td>Good quality control. (B)</td>
</tr>
<tr>
<td>Have good staff. (B)</td>
</tr>
<tr>
<td>Have got policy in place etc. (B)</td>
</tr>
<tr>
<td>How we are funded. (B)</td>
</tr>
<tr>
<td>Staff used effectively. (B)</td>
</tr>
<tr>
<td>Manager could do with more time away from operations. (B)</td>
</tr>
<tr>
<td>Turnover a care co-ordinator appointment. (B)</td>
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<tr>
<td>Experienced trained staff - Continuous professional development. (B)</td>
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Potential for the Future

This shows how key people think the organisation has been preparing itself for what is to come - investment in infrastructure.

When completing this section of the review, participants were asked to rate the performance of the organisation and give a reason for the score. The reasons given are presented here.

B = Board, M = Managers, O = Others

IDEAS & INNOVATION
Lack of resources. (B)
Limited budget. (B)
Business plan in operation. Discussions on how to improve are held regularly. (B)
Need help to carry these out. (B)
Have not taken advantage of changing policies. (B)
Tend not to think "how" something "can" be done. (B)
Lack of business skills. (B)
Time & lack of ability to employ more management staff. (B)

LEADERSHIP
Well motivated management/board. Strong desire to deliver a quality service. (B)
Chairman & co-ordinator are always ready to help. (B)
Needs some improvement. (B)
Could be improved by motivation focus point it "can" be done! (B)
Very loyal staff. (B)
Manager communicates very effectively with board & staff. (B)

BENCHMARKING
Reasonably good in comparison to similar organisations elsewhere in in the country. (B)
Part of a wider network that allows us to measure our performance. (B)
Our branch is ahead of others in that we have completed our quality management system & stand by it. (B)
Have been approved since early 1980's. (B)
Have not tended to look outside the company - very insular. (B)
Need to strengthen relationships with others. (B)
Good relationships with other local organisations networking. (B)
Quality system in place. Reporting processes good. One of the strongest areas. (B)
Quality Assurance (B)
Staff appraisals. (B)
Client satisfaction surveys. (B)
The Board of Case Study 3 were asked to consider a number of areas of the organisation and rate them 1-10.

The graph below shows the range of scores given along with the average score for each area.

You should consider the comments supplied at the time when reading this.

The shorter the vertical bar the more consensus the team has. Where the bar is longer than 2, there may be a misunderstanding or lack of communication in this area.

Any average under 6 suggests significant room for improvement.
This shows how people in the organisation view financial factors.
This shows how people in the organisation view marketing factors.
This shows how people in the organisation view operational factors.
This shows how people in the organisation view the strategic management processes.
This shows how people in the organisation view the style of management.
Management Values

This shows how people in the organisation view the values the organisation demonstrates.

Care for Environment
Community Relations
Customer Focus
Learning Organisation
Quality Ethos
Respect for People
Supplier Relations

Managers
Board
This shows how people in the organisation view people management factors.
This shows how people in the organisation view the management skills of senior management.
The Board of Case Study 3 were asked to consider their own abilities in a number of areas and rate themselves 1-10.

The graph below shows the range of scores given along with the average score for each area.

While wide ranging scores in any given area is not necessarily a problem, the important point to determine is the extent to which the team has a balance of skills and are they in the right places? Any areas where there is a low average should be considered as a training or development need for the management team.