

THE AGILE UNIVERSITY

CASE STUDY

UNIVERSITY OF SOUTHAMPTON WHOLE SYSTEM STRATEGIC PLANNING

*A process and approach for strategy engagement and
cultural change*

UNIVERSITY OF
Southampton



elementa
leadership

The Context & Need

In order to build a sustainable, high performing organisation The School of Health Sciences decided to take an inclusive approach to the development of its 2010 to 2014 strategic plan. This approach would ensure that the collective knowledge and creativity within the organisation and amongst its partner organisations and 'customers' could be tapped into to inform strategy development and implementation. This systemic approach which takes 'voice', engagement and partnership (co-creation) as its central tenets and sees strategy development and implementation as a dynamic and emergent process that is essential when the external adaptive challenges are complex. The more rigid, mechanistic forms of strategic planning tend to be better suited to a context in which the external adaptive challenges are few and largely knowable and predictable and where a small group of senior managers might have (or believe they have) all of the necessary knowledge and insights between them to confidently plan for the future by themselves.

The approach adopted was designed to create the capacity in the new School of Health Sciences to continuously adapt to a fast changing external environment, guided by its vision of becoming a world-class institution and a core set of values that define its ethical approach to achieving this. In short its aim was to sharpen and clarify its world-class aspiration and develop a plan and culture capable of realising this.

The merger of three Schools (School of Nursing and Midwifery, School of Health Professions and Rehabilitation Scientists and the Healthcare Innovation Unit) to create the new School of Health Sciences at The University of Southampton set the context for the new Head of School to develop a vision and strategy that would help in creating a genuinely new and vibrant organisation and one that aligned with the University's world-class research and teaching aspirations and goals. None of the predecessor organisations had previously engaged in any formal strategic planning and marked cultural differences existed between the three merging entities. The Head of School was very keen to define key strategic priorities and goals and to galvanise her senior leadership team around these. She also wanted to ensure that at a time of significant change both economically and sectorally, that limited resources were invested to achieve maximum impact for both the new School and the University as a whole. This new more 'corporate' and strategically disciplined approach would require the 'buy in' of staff for it to have the desired impact.

The Solution

The solution was developed through a process of co-creation between the Head of School, an appointed Steering/Design group and Elementa Leadership. It was quickly agreed that the approach needed to actively engage all staff, making it easy and legitimate for all to have a 'voice'. It was also agreed that any solution should bring together, in dialogue, academic and non-academic staff.

The Strategy Engagement Process



Stage One School Executive Strategic Thinking and Planning Workshop

The purpose of the School Executive Strategic Thinking Workshop was to engage the School Executive in clarifying the aspiration for the new school; building and agreeing a process for the development of the strategic plan that would help realise this and clarifying the appropriate role and behaviours of the leadership team in ensuring a successful outcome. This workshop also identified a need to develop and disseminate a set of distinctive School values that would influence the future culture and guide the way that strategy would be implemented. This work was successfully undertaken by a specifically convened staff project group who reported their recommendations back to the School Executive after wide consultation within the School.

Stage Two Strategy Engagement Design/Steering Group established

A Strategic Engagement Design/Steering group was established to guide and advise the School Executive on their emergent plans for developing the new strategy. The composition of the group was a representative mix of academic and non-academic staff from all parts of the School

The Solution

Stage Three Training and Briefing of Strategy Engagement Facilitators

Facilitators were selected and attended briefings and training for their role in facilitating table group discussions at future large group strategy engagement events and to play an internal ambassadorial role in explaining and representing the approach and process. The facilitator group was made up of a mix of academic and non-academic staff from all parts of the School.

Stage Four Staff Strategy Engagement Event (1)

The large group events were designed to engage all staff in the strategic thinking and planning process, soliciting feedback on the emergent strategic plan and fostering a sense of 'community'.

Stage Five School Executive Review and Planning Point (1)

The School Executive reviewed emergent themes and issues from the Staff Engagement Event, reviewed the outputs, clarified the strategic goals and key performance indicators and planned the Stakeholder Event

Stage Six Stakeholder Strategy Engagement Event

The purpose of this event was to engage key stakeholders and customers as partners in the strategic thinking and planning process and to solicit feedback on the emergent strategy. These stakeholders included commissioners of education (the NHS) together with feeder institutions (sixth form colleges and FE), students themselves, patients and service users, voluntary sector organisations, research funding bodies, the wider University and local MP's including the Secretary of State of Universities, Business and Skills, who officially opened the new School of Health Sciences.

Stage Seven Staff Strategy Engagement Event (2)

The second of the staff engagement events focused on action planning. Staff feedback from the first event had been considered and where appropriate, incorporated in to the emergent plan. Staff now had the opportunity of reviewing the near finished plan as a whole and were then able to recommend year one priorities and actions against the various plan goals.

Stage Eight School Executive Review and Planning Point (2)

The purpose of this planning and review stage was to review the emergent themes and issues from the Staff and Stakeholder Engagement Events, to review feedback and recommendations from these events and to clarify and define improvements to the emergent plan. Strategic Theme Leads were appointed and further developed emergent plans 'offline' with coaching and support from the Head of School and telephone coaching and support from Elementa Leadership.

The Solution

Stage Nine School Executive Review and Planning Point (3)

The purpose of this stage was for the School Executive to review each strategic theme and bring the final elements of the Strategic Plan together. The School Executive worked together to:

- Review each Strategic Theme Lead presentation
- Clarify and identify goal interdependencies and relationships
- Consider and assess financial and resource implications against proposed year one goals/actions
- Clarify and define final improvements to the emergent plan
- Develop a clear goal directed Strategy Implementation Plan
- Plan communications to staff and stakeholders

The Result

The process successfully produced a new strategic plan for the new School and at the same time positively contributed toward the post-merger integration process. The School of Health Sciences subsequently became the Faculty of Health Sciences following a University wide re-organisation.

In the view of Professor Jessica Corner, now Dean of the Faculty of Health Sciences:



“The approach to whole system strategic planning that we used with the support of Elementa Leadership has been invaluable. It simultaneously allowed the development of a clear sense of direction owned and developed by all, including stakeholders, which continues to inform our decision making. It also provided a more rapid change process in relation to integrating disparate groups of individuals, teams and cultures than could have been achieved by structural change alone. More importantly, it was fun and very sociable, a great way for people who have never worked together before to find common purpose and time out from the day job. We continue to use the methods and processes in our day to day activities so there is an ongoing trace of strategic thinking and participation and ownership of direction and purpose by all. That is not to say that the challenges of leading and managing a complex organisation in the very demanding times we all share in public service organisations just now are any less, there are just better ways of finding one’s way through them”

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