

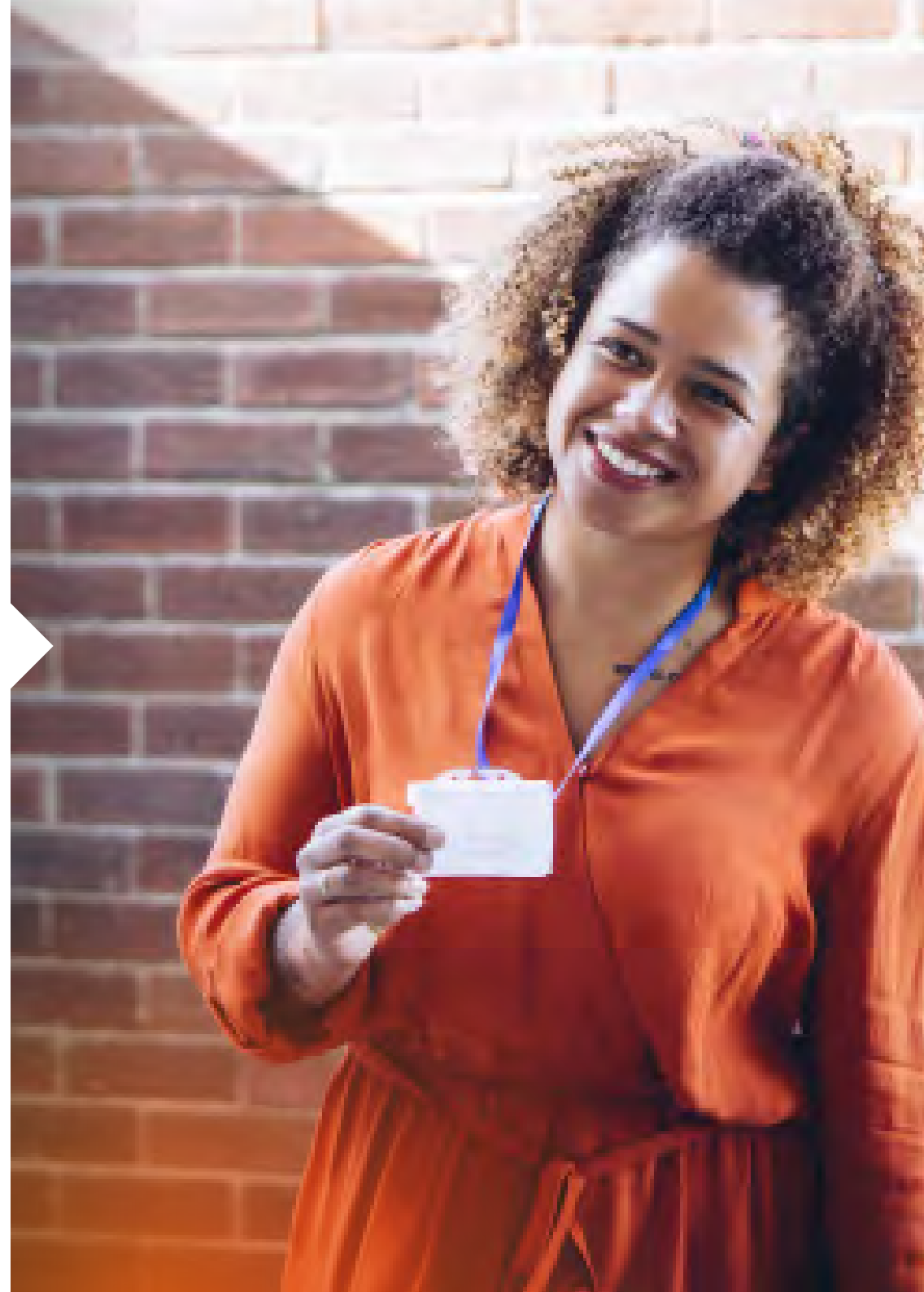


Local Government

How Waltham Forest Council transformed development for both office and frontline workers



CASE STUDY



Client

Waltham Forest Council, based in East London

Industry

Local government

Project

Discovering and delivering the best system for a diverse workforce

Introduction

Local authority Waltham Forest Council has a diverse workforce serving over a quarter of a million residents – but their legacy performance management system wasn't serving them all effectively. Here's how Advanced made a difference, in the council's own words.



Background: a traditional system

At Waltham Forest Council, we look after the needs of more than 275,000 residents in North East London. Like all local councils, we have a broad and diverse mix of employees, from frontline workers in healthcare and education to office-based teams at various sites, including Waltham Forest Town Hall.


For some time, we relied on a traditional annual appraisal system supported by a legacy – and complex – HR system. Over the years, our appraisal exercise had become as much about compliance as it had development: numerous, complicated forms needed to be filled in, and there was a strong focus on measurement. It meant we spent more time shepherding as many people through the process as possible than we did searching for ways to help employees grow.

Ben Plant, our HR Director, explains: “You have to remember that this was set against the backdrop of austerity. All local councils were keen to make savings. When we looked closely at where our development budget was going, we saw that far too much of it was being spent helping people to navigate the system. When you have a tool designed to develop performance, you want it to develop performance.

“But we weren’t able to spend our budget on training to help managers have useful conversations with employees or identify areas for development, because it was going on training to use the system, helping people who were stuck in the system, and so on. That was a really unsatisfactory state of affairs.”

All of this complexity also had an effect on our HR team, who were forced to act as ‘compliance police’, coaxing and cajoling people into using and completing tasks on a system that no one wanted to use. This naturally affected the value of our data, as employees and managers desperately wanted to tick the boxes and get back to their everyday work.

Our HR team wanted to redirect their budget and resources away from all this, and towards helping our managers be better managers. They had conversations with senior leadership, managers and employees across our council and kept encountering the same opinions. Our people knew that the appraisal exercise had become more about compliance, with the ultimate aim of awarding a rating at the end of the year; very few believed that it enabled good conversations and supported development.



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What we could then offer people, with the budget we've freed up, was training that made a real difference to performance. We could train people on how to have better and more constructive conversations with their colleagues.'

Ben Plant
HR Director

Trialling new options

Our HR team wanted to deliver an alternative without a huge overhaul. They made a point of not announcing a big organisational and cultural change, concerned that it could overshadow the work they wanted to do.

The first stage involved small-scale testing. Our HR team identified three potential new performance management systems — two that focussed on continuous performance development, and one that offered a more traditional approach based around an annual appraisal — and chose two teams to test the systems and get detailed feedback.

The teams they selected came from two very different areas of our organisation: Children's Social Care and Economic Development. Our Children's Social Care team are frontline workers, dealing directly with local residents and working in a number of locations in any given month. Meanwhile, our Economic Development team are almost entirely office-based, and with a much more traditional working week and workload. The managers of both teams were enthusiastic about the idea and were keen to work with HR to trial the new systems.

To make the trial work, the process had to be carried out in an extremely open and collaborative way. Our HR team regularly went on location with the teams to answer questions, capture feedback and discuss the merits of each system.

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Izzie Hurrell, a project manager supporting our HR team, explains her part in the testing phase: "I did a lot of sharing wall work. I'd be in the departments with a whiteboard on wheels, capturing that feedback. I'd send around group emails and post messages saying that I'd be in a certain place between certain times, and I'd be available to answer questions. People really came up and engaged. They wanted to know what was going on, they wanted to share their opinions on the wider issue of change and what they thought development should look like."

Once they had captured a critical mass of data, our HR team put together a recommendation for the council board. Testing with real teams and putting together raw adoption and usage data as well as anecdotal feedback, was a huge factor in the success of the project.

“I don’t think we would have got very far if we’d gone straight to senior management and proposed that we simply adopt a new performance management tool,” says Ben, “The fact that we’d run the testing, that we’d been rigorous in looking at the system with live teams in such diverse areas of the organisation: that made a really compelling case for the change that we wanted.”

“We’d been able to focus and engage with people throughout the process. We’d captured a lot of feedback, had a lot of discussions with people about what they wanted and what was working for them. It’s so hard to say ‘I want to deliver a big cultural change for more than 2,000 people’. It’s much easier to say ‘We’ve tried this out with some of our employees and here is what they think, these are the benefits, and we feel that this system, in particular, will give us what we need moving forward’.”



A woman with reddish-brown hair tied back, wearing a light blue button-down shirt, is speaking and gesturing with her hands. She is looking towards a man on the left, whose back is to the camera. He is wearing a patterned shirt and glasses. The background is a blurred office setting with a plant and wooden furniture.

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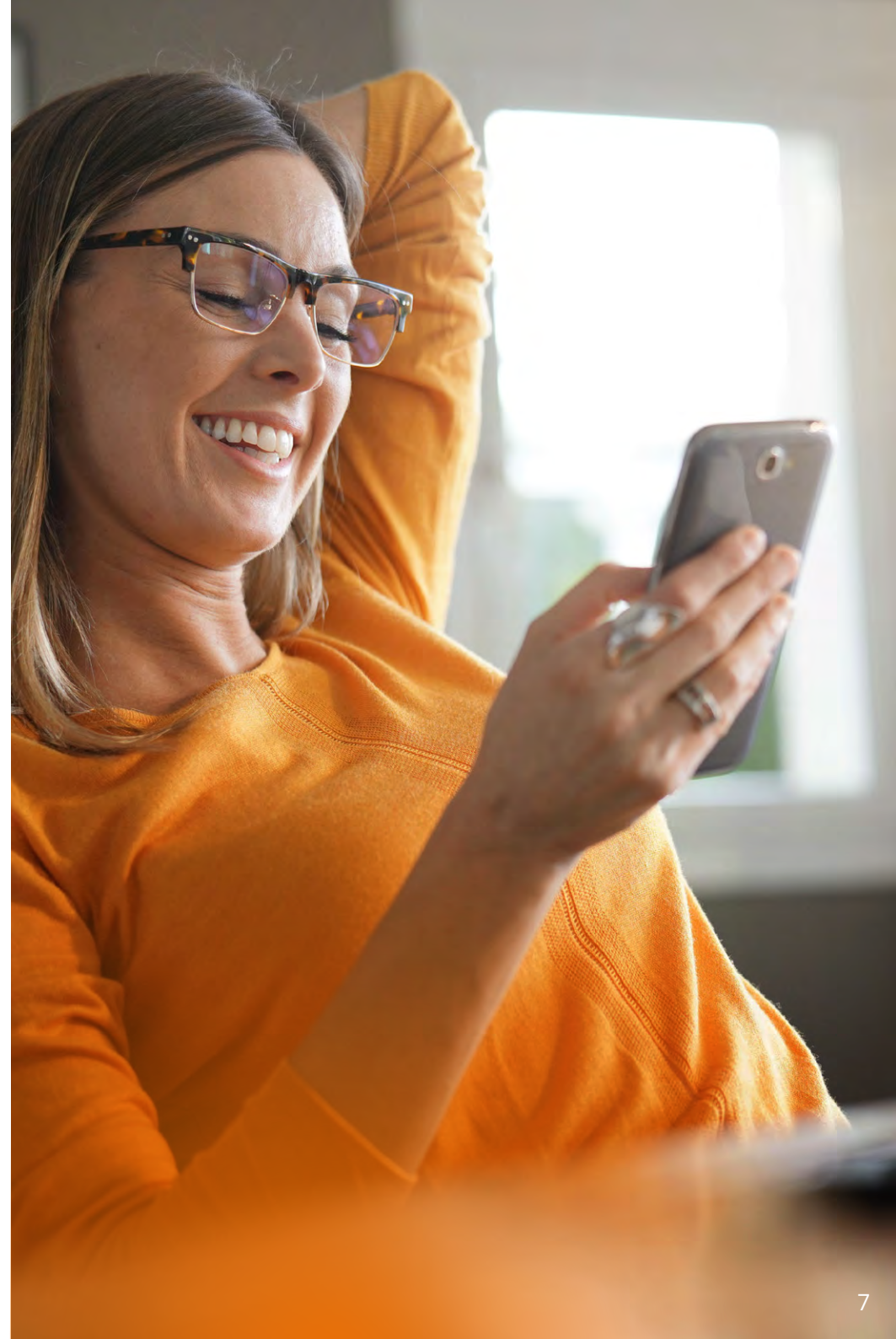
Ben Plant
HR Director

A clear winner

We were interested in a continuous performance development model from the beginning because it relates strongly to the work we already do with residents. Ben explains:

“So much of social care, from a practice perspective, is about ongoing relationships and conversations with service users rather than one-off assessments. Just as we’re transforming those services, investing in more meaningful relationships with residents and service users, it’s great to be able to use that model to strengthen relationships between managers and employees.”

Advanced’s performance management platform, Advanced Clear Review was by far the best-received model that we trialled. In satisfaction surveys run regularly throughout the testing period, it consistently scored 90% and above. Feedback focused on the simplicity and intuitiveness of the system. Accessibility was also a big factor: our previous system required the user to be registered on the council’s intranet, which added another IT workstream to the process. None of that was required with Advanced Clear Review, bringing down yet another barrier to adoption.



An intuitive, money-saving solution

When we rolled out our new system, we were surprised to find that one of the most immediate impacts on our HR team was financial. Previously, they'd been earmarking resources to support people in the use of our legacy appraisal system, which was having an impact on other projects.

Ben says: "Don't underestimate the value of that simplicity. When we started moving teams onto Advanced's performance management platform, Advanced Clear Review, we were able to say 'We don't need to sit you in a classroom and teach you how to use this. We think it's intuitive enough that, with the help of a short instruction video, you should be able to log in and start using it straightaway.' What we could then offer people, with the budget we'd freed up, was training that made a real difference to performance. We could train people on how to have better and more constructive conversations with their colleagues."

As Ben explains, the platform's flexibility has been another revelation: "We have such a wide variety of job functions and working practices within a council. We have school staff and lecturers who work to an academic year; we have accountants who work to a financial year; we have project managers who aren't interested in those timescales and operate around the lifecycle

of their particular project. All of those groups, and plenty of others, have a particular and important investment in those calendars. It's vital that they work around them and Advanced's platform is flexible enough to help them do just that."

The administrator view on Advanced's platform is equally intuitive and has given our HR team the data they need, at a glance, on all our diverse groups and functions. We also have a lot of praise for the Advanced customer success team, who were an ongoing resource during our phased rollout. As we rolled out the system in a staggered way, over the course of around six months, there were times when some employees were using our legacy system and some the new. Advanced's customer success team worked closely with us to make the transition as simple as possible.

A few months on from launch, we were able to achieve 84% adoption of the system across our entire workforce, from office workers all the way through to frontline services. We're confident that take up will rise further as we embed its use across the council. But, in the end, the human anecdotes are the most telling for our HR team.

“We had people asking us if the data from the test would be carried across to the live system when we rolled out. Not because they were concerned about what they’d said: it was because they enjoyed the work they’d done on it during the test. They were invested. They wanted that data to stay available,” says Izzie, “And managers loved that visibility: the ability to see all the way down the pipeline. For me, the big learning was that you don’t need to be an IT person to deliver an IT project: you just need to understand what different departments need to progress things. It’s about transparency and about cutting through the inter-departmental walls to get people talking.”

“If someone is looking to deliver a project like this, I’d tell them to be positive. In any project of cultural change — and that’s what it is, however you describe it — people will have scepticism. Although the reaction to Advanced Clear Review was really positive, you do have moments when you need to stick to your guns. And the most important thing is to remember that a project like this is about people taking ownership of their own development. That is never going to happen overnight. But when it does, it’s worth the effort.”

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+44(0) 330 343 8000



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hello@oneadvanced.com