



Background

Cairn Housing Association is one of Scotland's largest providers of affordable homes, serving communities across the whole of Scotland for over 25 years. Cairn approached Enthios in 2016 asking us to design and deliver some training modules to support a new performance management software package from Cornerstone.

Cairn are a non-profit making registered charity with over 3000 homes, from Caithness in the north Highlands to the Scottish Borders., their staff have varied roles, many working directly with tenants.

The challenge

Programme Aim: 'To introduce a revised Performance Management process to replace the existing 'Working Together' process.'

Cairn wanted the programme to be delivered for all 185 staff in the organisation across four of their offices in Scotland. One design consideration was the amount of time that staff could be released from their duties.

It was important to Cairn that the modules reflected their stated strategy, mission, vision, values and competencies. This would ensure that every member of staff understood and could question how their role supported the purpose of the organisation and have them feel part of the wider service.

Programme requirements:

- 1) *Maximising potential*
- 2) *Achieving high performance working*
- 3) *Coaching Conversations (in the context of Performance Management)*
- 4) *Setting SMART Goals*
- 5) *Constructive Feedback & Handling Difficult Conversations*
- 6) *Personal Development Plans*
- 7) *Using Values and Competencies in the context of performance management*
- 8) *The programme needed to be integrated with the Cornerstone software.*

What Enthios did

To begin, we attended an introduction to the Cornerstone software with the first cohort of Cairn staff, as this allowed us to familiarise ourselves with the system and find out what kind of questions people were asking so we ensure the content we produced was as relevant as possible.

We recommended not to run separate workshops for appraisers and appraisees. Since most staff would take on both roles, we proposed to design workshops that examined the performance conversation from both perspectives. We encouraged staff to prepare for their own conversation.



Due to the distributed workforce, we designed a series of workshops that could be taken in any order, and which were related, but independent of each other. Each workshop was designed to run for 3 hours, which allowed for travel time, but also meant that two workshops could be attended in one day, thereby reducing the time away from work.

Where a workforce is geographically distributed, it is especially important to maximise the time spent invested in the training room. That means that we designed the workshops to concentrate on the elements that were best delivered face-to-face (so skills practise, giving feedback and the opportunity for staff to ask their own questions).

We were mindful that the introduction of the new process was 'context embedded'. There existed a history of previous systems and cultures around performance management, and we acknowledged that staff may have a range of opinions about these.

The four workshops were:

- 1. Principles of Performance Management – half day.**
Outlining the PPD process so that staff felt clear about its purpose, knowledgeable about the principles involved and confident in using it. We also included goal setting.
- 2. Coaching conversations, ask styles of feedback – full day.**
Providing managers with skills and techniques with which to encourage staff involvement in the performance review process.
- 3. Telling it like it is – half day.**
Providing staff with the skills required to give clear, concise feedback so that it is understood and acted upon by the receiver.
- 4. Working towards a Personal Development Plan – half day.**
Giving staff the opportunity to consolidate what they had learned on previous modules, and to practise leading a conversation to a written Personal Development Plan, which is understood and agreed by both parties.

In all the workshops, we concentrated on providing staff with simple pragmatic techniques that could be learned quickly and applied immediately. We took our usual, fun relaxed delivery style and participants said they enjoyed it and never felt talked down to. We took care to ensure consistency in the delivery of our training across all the modules, despite being at different times.

Enthios was able to work in all four locations with staff from different parts of the organisation. This had the added advantage that if for example a member of staff couldn't attend their session in Edinburgh, they could still take up the training at one of the other locations.

The results

In total 411 staff attended the workshops. Of those who completed detailed feedback:

cairn

- 100% agreed or strongly agreed that the training had met their expectations
- 100% agreed or strongly agreed that the training was interesting and informative
- 100% agreed or strongly agreed that the training was well organised and easy to follow
- 100% agreed or strongly agreed that their training objectives had been identified and followed
- 100% agreed or strongly agreed that the Training had covered the correct amount of relevant material

Cairn's plans

'We are currently meeting all outstanding requirements for staff who were unable to make the original training or have joined Cairn since it was provided. We have been really impressed with how flexible Enthios have continued to be in arranging this despite the small numbers.'

This training has enabled us to lay the foundations for a 'feedback culture' in Cairn and started our Managers on a journey to a 'Coaching Style of Leadership'. The feedback on the training has been so positive that we feel there is an appetite among managers to continue this journey and develop their skills and practices.'

Many managers have reported difficulty in managing discussions around Competencies and Behaviours. We are hoping that we can support them through the provision of some further development opportunities in handling this aspect of performance management in particular.'

We are currently developing the '3C Goals Bank' in preparation for the next cycle of performance management. We are hoping to incorporate this additional resource in future Performance Management Training and may provide something specific to support staff and Managers to take full advantage of this tool'.

What the participants made of it all

How do you feel the training will assist you in achieving the company values?

'It will keep me focused in delivering excellent customer service. Any training issues will be identified at an early stage enabling me to perform at a higher level. I am accountable for my actions and monitoring this will evidence my results as an individual and as a team. It is OK to give praise to colleagues'.

'I feel it made me more confident in reaching goals and expressing things more in what I do towards our Customer Values'.

How will you be able to apply the learning?

'confidence in giving praise to others. confidence in documenting my performance and evaluating any strengths and weaknesses'.



'When carrying out working together meetings with staff I can use correct open question techniques allowing staff themselves to elaborate and understand that in some instances coaching will not be necessary and specific instructions should be given'.

'The training and use of Cornerstone has helped me to focus more on each of the values and has taught me how my everyday work and actions help to achieve high standards'.

And what the client thought

Head of HR & OD, Jo Tolland, said, *'The PPD Soft Skills training has been a crucial element of the success of our implementation of a new staff Performance Management process. From the outset Enthios understood our needs and challenged us to think differently about how we were going to deliver the training. Luckily for us, they had the brilliant insight to suggest that we "start the conversations from day 1 between managers and staff" by opening 3 of the 4 workshops to all staff rather than modifying the workshops to suit the two different groups.*

This approach has transformed perceptions of the process and added value in a way which we had not anticipated. Feedback from participants has been incredibly positive resulting in unprecedented ratings for impact and relevance of learning. The key outcome for us has been that, as well as learning new skills and techniques, people really enjoyed the sessions and found them fun, which was exactly the note we wanted to hit! By association, this has set the tone for the whole roll-out process, removing some of the anxiety and nervousness staff may have had about performance management.

In addition to the quality of delivery, Kate, Miles and their team demonstrated genuine flexibility, adapting the training to meet the needs of our staff working remotely (in the far north Highlands) and for those who required a translator. They even went as far as attending our PM system training and creating user accounts so that they could integrate their training with the system people are going to be using. The final icing on the cake was the high quality but very accessible learning materials provided which will continue to serve as a useful resource for all staff when back in the workplace'.

HR & OD Service Manager, Julie Scott, said, *'The four modules provided were ideally pitched and we received impressive feedback from attendees on the approach used and the content of each of the sessions. The trainers skilfully managed to encourage participation without attendees feeling pressured. Enthios also managed to ensure that Cairn's Values were embedded into the training through innovative and cleverly designed training content.*

Enthios were flexible in both their design and delivery of the training and worked closely with myself during the whole process. This meant they were able to consider feedback from HR and attendees and adapt and modify training while keeping the required consistency in delivery.

All in all, the sessions were informative, enjoyable and above all valuable. Employees were able to apply their learning directly from leaving the sessions and were provided with material to take away in a small folder which will remind and help enable them to continue to apply the learning and techniques'.