



## **8 Transformers Case Studies:**

### **Bus Company**

The company is a large independent bus operator and has been operating its services since 1993. Currently the company runs subsidised services for a County Council, and commercial services along with many school buses.

The Transformers survey was carried out by the Director and her core operational team. The Director is necessarily aware of the mandatory qualifications and safeguarding checks her staff members require and has established an advanced checking system to ensure all her staff remain compliant. She wanted to gain a better insight into the higher-level skills and attributes her core team members use to enable the successful daily running of a very busy, demanding and complex operation.

The survey results confirmed there are a good mix of high level skills and attributes within the core team. Most of the core team felt they were able to follow their full potential and had good levels of autonomy. A minority felt they would like the opportunity to increase their work responsibility. The survey showed there are recruitment challenges mainly due to a local competitor. It also highlighted that training and development focussed on mandatory requirements and opportunities were not so prevalent in other areas like strategic management and negotiation, customer service, recruitment and retention.

The survey recommended that the Company develop a new role within the core team to oversee new and existing staff members and their training, also to show how progression is available within the company perhaps adding an edge on its competitor company. It was recommended that the company develop a new relationship with a local training and development provider that is based on the survey findings and recommendations and less on the 'off the shelf' and Apprenticeship scheme that was used and unfortunately hadn't worked well for the company in the past.

The Company embraced key findings of the Report even though some of the recommendations were challenging both from a strategic and operational stance. The Company raised the salaries of each member of the core team in recognition of their advanced skills and their contribution to the successful running of the company. It also advanced one employee's role to include responsibility of training and development oversight.

## **SME Engineering and Consultancy Company**

The current business has been in operation since 2009. The company undertakes work for private individuals, commercial businesses, registered social landlords and both general and specialist contractors. The business specialises in sustainable construction technologies, working closely with organisations such as The Green Register. The Transformers survey was carried out by the Director with his full staff team. The Director was interested in how the survey and resulting report might provide insight into his plans to grow and advance the company.

The analysis of the survey data indicates this is a high-specification, high value-added company with a highly qualified and skilled workforce used to exercise a considerable degree of autonomy in the workplace, while at the same time being very adept at teamwork. There is evidence of recruitment and retention difficulties due to supply challenges in the domestic labour market necessitating extensive overseas recruitment with corresponding commitment of management time and resources. Overseas recruitment is likely to become more challenging in the medium term due to Brexit and a general tightening of immigration procedures.

The Transformers Report recommended some recruitment ideas alongside thinking about a 'grow your own' long term staff development strategy. It also suggested that consideration of a review of the current Continuous Professional Development (CPD) offering is made to see if it can be enhanced for retention purposes and to cover future needs.

The Company Director used the engagement with the project as a PR exercise publishing the positive results about his team on the company website and on social media. He was also spurred on to organise his team members to offer CPD to other small engineering companies with online and virtual seminars. He ran with the support of the ULF Project; a workshop to review and establish a new formative Appraisal system with his full team to include a regular review of individual and CPD needs. The project experience and resulting training and development was shared at a BSI quality audit visit and his company was recommended to transition to the latest version of ISO 9001 BSI Accreditation. The new standard focuses on communication and continuous improvement. Holding this quality standard is a business advantage when bidding for new work.

## Conservation Organisation

This organisation was established in 2001 to provide nature conservation training in UK and EU via traineeships and volunteering opportunities. Their Mission is to

*‘provide inspirational education, practical action, science and technology training and volunteering opportunities in nature conservation in the UK and abroad... We help people achieve their goals for nature, science, education and employment’*

They work with 50 residential learners each year on long term (12weeks+) vocational courses with a further 20 learners on short duration (10 days to 2 week) work-based training experiences.

The organisation also works on a range of projects that target different groups including young adults, adults with learning difficulties and those from under-represented backgrounds. Trainees may have no previous qualifications or have completed a higher degree – in both cases some learners are seeking practical vocational qualifications that demonstrate they have the skills for the jobs to which they are making applications.

Although the organisation is relatively small it is expanding steadily and is seeking to both increase and diversify its income stream.

The Transformers Project research team worked with a survey return of 13 employees/ work-based trainees and the employer/Director. The Director was interested in how the survey and resulting report might provide insight and potentially confirm the benefit of a training approach which positively promotes transversal skills by encouraging a learning environment Growth Model (Carol Dweck) and Guy Claxton’s four ‘Rs’ of Learning Power, Resilience, Resourcefulness, Reflectiveness and Reciprocity.

The Transformers survey analysis did show a well-qualified and well-equipped organisation with a clear ambition and sense of direction. This organisation appears to be a forward-looking employer and Learning Provider with a high degree of staff and trainee commitment which gives it a good basis for the expansion of its activities. The establishment is operating in an area where employment opportunities in public, voluntary and private sector organisations are likely to expand subject to risk factors such as Brexit. The Report suggests expansion plans will probably necessitate growth in both numbers and expertise in the core team and measures needed to improve resilience will need to be considered. The survey analysis produced a positive affirmation of the direction of travel and training approach for the organisation. Getting involved in the project has affirmed clear links to the organisation’s strategic business plan and has led to other professional partners showing an interest to work with Transformers in the future.

## **Military Personnel Development Centre**

*"Personal Development is for everyone; it is not limited by rank, location or trade."*(from Mission statement)

The Development Centre was established in 1998 and is a registered charity. The centre provides apprenticeships and nationally recognised civilian qualifications for serving personnel, reservists, veterans and their dependants. The centre currently offers over 40 civilian vocational and professional qualifications to help improve skills and knowledge to benefit current roles and in preparation for future careers. The qualifications cover a wide range of subjects to include, Logistics to Telecommunications, Teacher Education and Training, Functional Skills and Leadership and Management.

The Chief Executive and Operations Director joined the project against a background of Centre delivery staff realignment. Data was gathered from a survey with the employer and 42 employees, representing a 100% return, this enabled an accurate picture of the skills profile of the organisation to be constructed. The centre works with learners with widely differing ranges of experience and prior academic achievements and at very different stages of their careers. This means that of necessity it must accommodate a large variety of needs and aspirations and to liaise with a wide variety of external partners. This, together with the complexity of the English Vocational Education and Training (VET) environment, makes considerable demands of the expertise available in the organisation.

The survey analysis results show a highly skilled workforce able to operate in a complex educational and client environment. The work is varied and at times intense. Personal responsibility, teamwork and communication are recognised by employer and employees to be crucial to successful delivery and to the enhancement of productivity. The comprehensive data available on the exercise of transversal abilities such as planning, co-ordinating, communicating, controlling, evaluating and judging, suggest that the great majority of employees exercise these abilities as part of their daily operations and that individual autonomy, communication and communication through teamwork and planning and evaluation both individually and in teams are a habitual feature of the work of the Centre. The evidence that employees enjoy high levels of autonomy and trust in their work is varied and convincing.

The Report recommended that consideration could be given to further explore workforce perceptions and expectations through consultation and job design. This action may determine whether there are hitherto unnoticed opportunities to enhance productivity, grow awareness of the operational environment and scope of operations. Consideration could also be given to explicitly developing a learning charter via a 'skills' champion which might help articulate the wide range of perspectives and expectations around training and development.

The Transformers survey and resulting Report was used in strategic discussion with the Centre's Board of Trustees, to help inform decisions for realignment and job design. They are planning to carry out an evaluation process following these changes.

## **Professional Membership Association**

The Association is a not for profit membership organisation which looks after the interests of individual professionals. In parallel to the Association there is a union with its own democratic structure and rules. The employee support team include experienced professionals and lawyers, and the organisation is supported by an advisory board. The Association and trade union has a membership of over 27,000 professionals. It is responsible for support and insurance services for this substantial membership which suggests that widely differing needs and problems will need to be accommodated.

The research team worked with the National Director, HR Manager who were interested in gathering their own and the workforce's perceptions on skills and productivity. The resulting analysis and Report findings may inform future strategic planning for training and development. Data was gathered from an excellent survey return involving the employer and 41 employees. This enabled an accurate skills profile for the organisation to be constructed.

The qualitative responses arising from the survey highlight the range of external stakeholders including members, the Regulator, senior company executives, tribunals and courts. High levels of specialist knowledge, trust and autonomy are vested in the workforce and teamwork is vital. The survey responses suggest that team roles and purposes are transparent. There is an understanding of how each team member contributes to the overall aims and purpose of the organisation. Higher order skills are systematically used. The comprehensive data available on the exercise of transversal abilities such as planning, team work, co-ordinating, communicating, controlling, evaluating and judging, suggests that the great majority of employees exercise these abilities as part of their daily operations. There is diverse and convincing evidence that employees enjoy high levels of individual autonomy and trust. Personal responsibility, teamwork and communication are recognised by both the employer and employees to be crucial to successful delivery and the enhancement of the membership support, and organisational growth.

The Report recommended that it may be helpful for a consultation on workforce training and development expectations be carried out. The consultation could attract ideas for organisational growth and succession planning. The Transformers project has offered to provide via a focus group or professional development workshop further opportunity to explore workforce perceptions and expectations on skills training and development and support a review of the organisational learning agreement. This activity could be illuminating and form the basis of timely and advantageous workforce development steps.

## **A specialist printing Group**

The Group employs just over 100 people. The company are UV Printers of plastic, board and flexible plastic sheets producing a range of products such as gift cards and plant labels. The Group offer a full-service solution to clients encompassing branding, design, print, promotion, stock management, distribution and marketing support.

The printing sector is a dynamic sector with a high degree of competition. There is pressure from technological advances and shifts in patterns of customer demand (particularly a trend towards more bespoke products with relatively short print runs). In the UK Printing Industry – Future Focus survey report (2014) an argument is made about the need for a shift to a new business model. The report suggests the internal focus of the industry is shifting away from cost structure, maximising operational effectiveness and business process, and re-engineering towards building capabilities for faster growth, and the acquisition and retention of the best people. The report suggests the more successful companies are harnessing the full potential of the entire organisation in a rapidly changing business environment and concludes that the new business model has much stronger focus on the basics of what ultimately creates value today, namely, people, knowledge, and coherence.

Within the context of these industry developments the survey and resulting Report provides insights which build on the existing good practices in the specialist printing Group to empower their workforce to contribute ideas for future training and skills development.

The survey findings show the Group have staff with good higher-level transversal skills, such as teamwork, coordination and control of work tasks, communication including the supervision of others, and reflection and evaluation on the quality of their work.

The responses all indicate that the employee team typically understand and recognise the higher-level skills they use in the workplace. The questions concerning workplace development and learning new skills show a majority think they are developing and improving their workplace learning but do not indicate how this is enabled which suggests that informal workplace learning is occurring.

The survey analysis and resulting Report made recommendations to consider that the staff development policy is reviewed to identify what development opportunities might be available for progression in the company alongside the existing qualifications and training policy applied to all levels of the company. It was also suggested that it may be useful to determine whether staff at the operative level and above are able to make the most of the technological advances in the printing industry, and if not what kind of training might facilitate improvements in responsiveness to customer need and enhance the quality of products. It was felt that the responses suggest how the staff team could be utilised in a facilitated conversation about training and development. This potential opportunity fits well with the existing staff forum and listening group already in place at the Group.

## **A commercial printing business.**

The company produces a wide variety of print including posters, brochures, magazines and leaflets. The company have invested heavily in latest technology.

The survey analysis and resulting Report confirmed that generally, the workforce is stable, however at operative level there is difficulty in finding suitable employees. It is felt this is because the company draws on a labour market where there are high levels of employment and employer demand for employees. The workforce is well-qualified and possesses the level of qualification required for high performance according to current job design. At the operative level there appears to be a considerable degree of independent working. Primarily, transversal skills of co-ordination, communication as well as planning, control and evaluation appear to be well embedded into working practices.

The organisation has a mandatory training policy and employs at least one apprentice. Maintaining the expertise of the workforce at a good level appears as a key management priority. The well-qualified workforce has the potential to put the organisation in a good competitive position in relation to changing technologies and customer demand. However, we understand a consequence of having a well-qualified workforce is that there are also employee aspirations for further development. Research has consistently suggested that continuing vocational education and training take up is in tandem with the level of initial qualification of the employee. The higher the latter, the greater the take up of continuing vocational education and training. This enthusiasm to continue developing and the investment made by the company in response of this need could of course be a potential commercial asset for the company. The survey data has indicated that a key management priority is to maintain the expertise of the workforce. The use of high-level skills by the workforce is apparent and embedded in working practices.

Although the workforce is stable and well qualified, retention could be an issue in a tightening labour market, and it is recommended that enhanced job satisfaction might be a way of ensuring this while exploiting possible productivity gains through greater staff engagement in contributing to training and development strategy. There is some scope for consideration as to whether further training at operative level has the potential to maximise return on investment in design and production technology and whether this in turn could lead to greater initiative in responding to customer need at the operative level.

Through the Transformers project the organisation has had its knowledge and understanding of its valuable workforce skills and attributes acknowledged.

## **A Business Support Service**

The Transformers project worked with a small specialist team within a not-for-profit company with 200 staff and an annual turnover of £10 million. The Company offers a wide range of business support programmes for companies of all sizes which include skills development, business advice on topics such as growth and export and innovation. It has a large governing body consisting of experienced and senior businesspeople. The specialist business support service was set up in 2017. The service offers free advice on skills within businesses. This service strand employs a core team of advisors and administrators and has access to a wider circle of specialists working on different aspects of business development activity.

The survey was undertaken by one senior manager and nine employees from the service core team. It is evident from the survey data that employees consider that they have a high degree of autonomy in the workplace, taking responsibility for the quality of their work, co-ordinating and communicating widely, both within and outside the team, particularly with the clients whom they support.

In the survey exercise, the staff team provided detailed and numerous examples of the ways in which they exercised transversal abilities in the course of their work. Transversal abilities are key to independent working, to teamwork, problem solving and project management. Examples include planning, communication, co-ordination, innovation and evaluation. Some staff appeared to have a high degree of autonomy in the way that they engaged with clients and in the scope that they had to make use of their own expertise. There also appears to be a high degree of teamwork and a collegial approach towards working together. There appear to be a range of opportunities for communication, one member of staff expressing the view that s/he might liaise with both businesses and education providers to ensure matching provision to business needs. There is evidence of a high degree of self-evaluation of work and the quality of work is judged by individuals in relation to client expectations as well as by line managers.

It was recommended that opportunities for informal learning and the sharing of the survey findings of the Report between employees could be encouraged, possibly through a mechanism such as the staff forum or through job redesign. This activity could be the focus of a management scoping exercise.

The organisation that offers free opportunity and skills expertise to other Business has had an opportunity through the project to focus on its own workforce team skills and attributes. The project opportunity may offer a precursor, a useful profile of perceptions, to other businesses before Training Audits are carried out.