



**BUSINESS**<sup>®</sup>  
**DOCTORS**  
ACHIEVE YOUR VISION

DEDICATED TO HELPING  
SMALL & MEDIUM SIZED  
BUSINESSES ACHIEVE  
THEIR VISION

# RoSPA

Proposal Approach for Strategic Review  
of Tenders and Workplace Safety

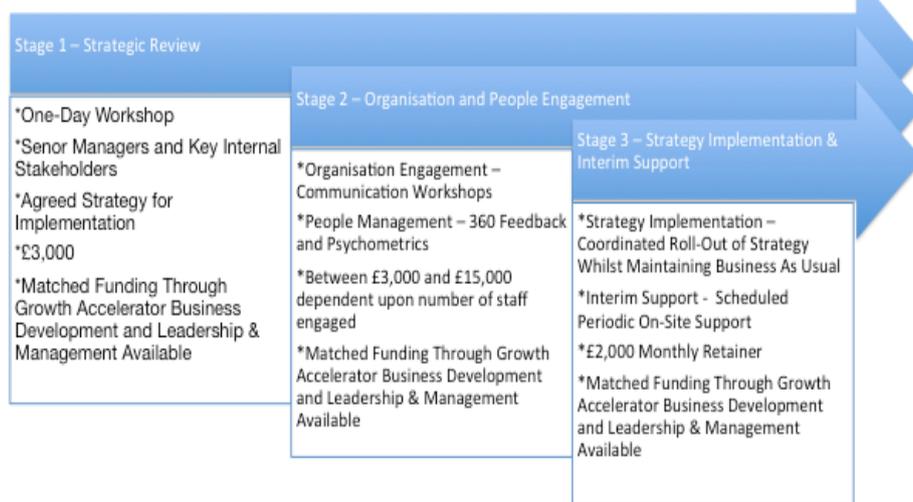
Prepared By Business Doctors  
October 2014

# EXECUTIVE SUMMARY

Business Doctors is delighted to provide RoSPA with an initial proposal approach for a review of its Tenders and Workplace Safety operations.

Following an initial meeting with Rob Burgon and Bal Timana, Business Doctors has identified a high level routemap of work that shall lead the Tenders and Workplace Safety functions towards a stronger and leaner business unit, able to meet new market opportunities delivered by a cohesive team of aptly skilled individuals sharing the RoSPA vision to Save Lives and Reduce Injuries.

## RoSPA High Level Strategy Review & Implementation Approach



Business Doctors has experience of working with organisations that are preoccupied with resolving immediate operational issues - often forsaking the ultimate objectives of the organisation. This leads to the shared business vision becoming a disparate set of personal work disciplines weakening the organisation’s true capabilities. Our holistic approach - to understanding businesses, their aspirations, their markets and their employees’ drivers - results with our clients implementing clear, measurable and achievable strategies that deliver growth and sustainability.

As an accredited organisation, Business Doctors can help RoSPA secure government funding towards the strategic change within RoSPA.

**We trust the approach outlined hereafter stimulates the desire for change and we look forward to hearing from RoSPA with a great deal of interest.**

## STRATEGIC REVIEW

The RoSPA focus for efficiency and growth, a business review and preparation of a strategic plan is an absolute necessity. Creating a strategy for growth will help to re-focus the business unit on delivering the outcomes that RoSPA want and provides an effective framework for positive change.

The Business Doctors Strategic Review gives you...

- A model for making informed decisions
- A robust basis for more detailed planning
- Clarity when explaining the business and vision to others in order to inform, motivate and involve
- Benchmarking and performance monitoring
- Positive stimulus for change and a clear focus for growth
- A clear plan of action for implementing the new strategy

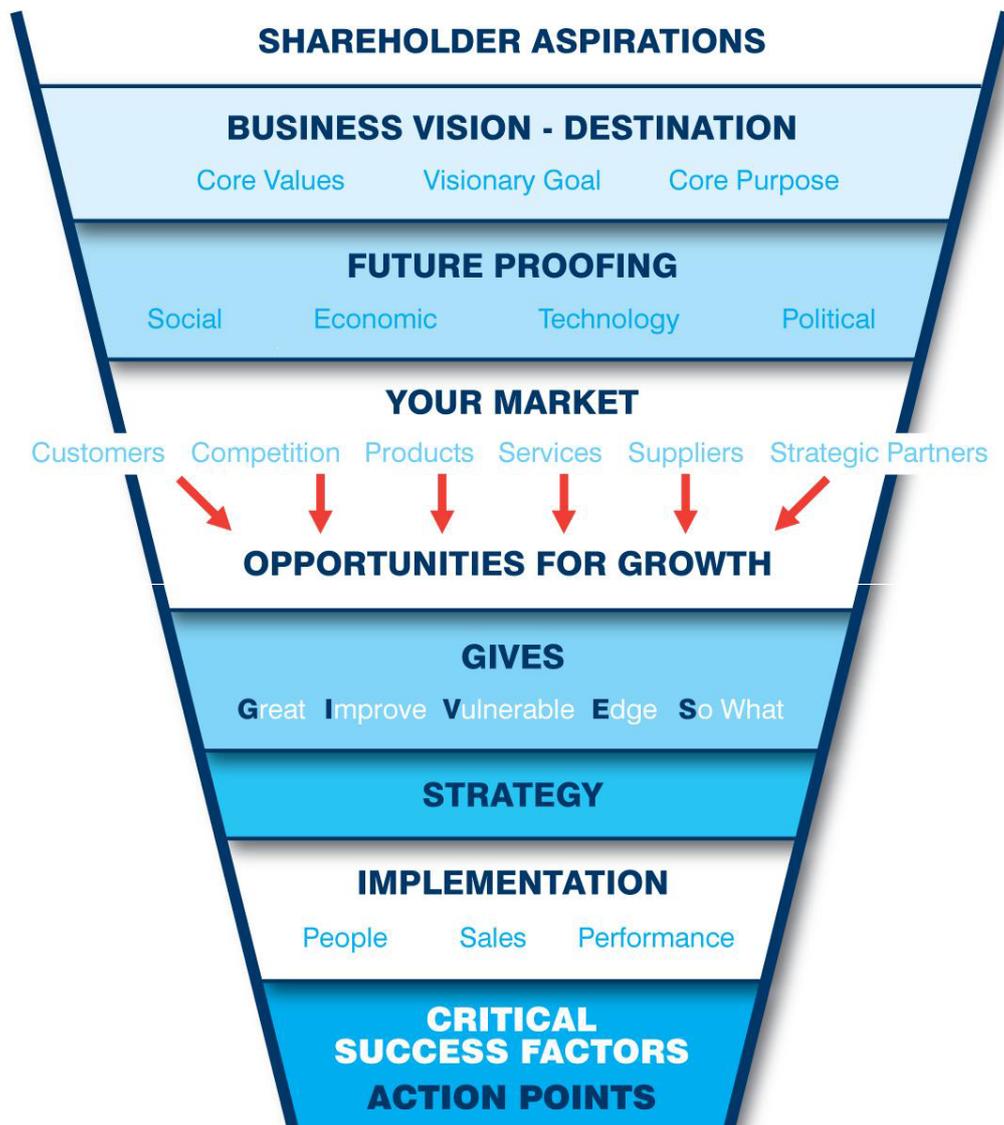
This strategic plan should not be confused with a business plan. Whilst a strategic plan can provide the foundation and model for a creating a “business plan”, they are two very different things. A strategy provides a living and breathing template for running the business, and engaging everyone one involved in the business in achieving a common goal. A business plan is normally written to communicate with people external to a business to justify financial support or ongoing investment at a very specific point in time – they typically have very limited shelf life. A satisfactory strategic plan must be realistic and attainable so as to allow managers to think strategically and act operationally.

### Our Practical Approach to Strategic Planning

A critical review of past performance by the owners and management of a business and the preparation of a plan beyond normal budgetary horizons require a certain attitude of mind and predisposition. Some essential points which should be observed during the review and planning process include the following:

- Relate to the medium term i.e. 2/ 4 years
- Be undertaken with directors and senior management
- Focus on matters of strategic importance
- Be separated from day- to- day work
- Be realistic, detached and critical
- Distinguish between cause and effect

This process is completed in a single day, and followed up with the preparation of a Strategic Review Report, reflecting back all outputs from the planning day and providing a coherent plan for implementation and is best summarised in the following diagram:



## ORGANISATION ENGAGEMENT & PEOPLE MANAGEMENT

Creating a strategic plan for focusing your business unit it relatively easy - THE most essential step in making this happen is ensure that RoSPA will have a focused team of people working in the business unit motivated and committed to delivering it.

This can only be achieved is by engaging and involving your staff in the process – this does not mean simply telling that the business unit has a new strategy and expecting them to change the way they work to accommodate it, it means involving them in the process, listening to their ideas and opinions and then acting upon these when managing the changes that are required.

In other words giving them ownership of the changes and allowing them to take responsibility for their role in the making it happen. Once the team takes ownership of the objectives, targets and action plans, they then become accountable to themselves and to the business unit. Accountability then enables individuals to self manage their own performance and for the business to support this through positive encouragement, recognition and reward.

Often the very first step in the implementation process is in re-organising and re-structuring of your people. Business Doctors will facilitate and project manage this process, working alongside Executives and the Senior Management team, we will help you re-engineer the existing team to ensure that you have the right people in the right roles. Our focus here is making sure that you maximise the performance and profitability of all the people involved in RoSPA;

- "Have we defined the job roles and their accountabilities required to deliver the plan"
- "Do we understand the motivation, behaviour, skills and experience required to maximize performance?"
- "Do we understand the capabilities, limitations and potential of our people?"
- "How do we improve, measure and manage performance?"
- "How do we attract, retain and motivate the best?"

Business Doctors help you address these questions and project manage this process diligently to ensure full consultation with the people involved, taking into account your duty and obligations to them as employees and best practice in terms of HR policy and compliance to current legislation.

Once the new structure is established and job roles agreed, we can then ensure that your people management processes are fully documented and organised. This includes the provision of

- Job descriptions
- Job and Person Specifications
- Competency Frameworks
- Personal Development and Training Plans
- Performance Appraisal Processes and documentation
- 360 Feedback conducted online but using other media if required

## **STRATEGY IMPLEMENTATION & INTERIM SUPPORT**

Many clients gain added value with Business Doctors assisting with the implementation of the strategy - working with individuals at all levels of the organisation to ensure the strategy is understood, any re-organisation to re-

structure is achieved with minimal disruption to 'business as usual' and that the agreed business and personal metrics are established, monitored, reported and tuned where appropriate.

Experience demonstrates that clients prefer the Business Doctor to be available on a monthly-retained basis which has been considered as part of this approach.

## **SUMMARY**

Whilst many organisations opt for wholesale improvements to their structures, people requirements, business processes and business tools, an equal number also succeed by improving a prominent area of the business first, replicating the success later throughout the organization.

This approach proposal has been formulated on the health check discussion held on 21<sup>st</sup> October 2014 and focuses on a routemap for change applicable in the first instance for the Tenders and Workplace Safety functions of RoSPA.

A three stage approach has been considered:

1. Strategic Review
2. Organisation Engagement and People Management
3. Strategy Implementation and Interim Support

Funding towards the overall cost of the approach can be achieved, primarily through Growth Accelerator Business Development and Leadership & Coaching 'pots'

Business Doctors is confident that the visible desire for change and business improvement will ultimately benefit RoSPA, the market place it currently serves, and to new market opportunities.

We look forward to the prospect of working with you and are available to follow up this approach proposal to meet executive management to complement their understanding of our proposal.

## **CASE STUDIES**

1. [Expect Mental health Charity \(Page 7\)](#)
2. [Coaching Local Strategic Partnership \(LSP\) Boards : The Cheshire and Warrington Sports Partnership \(Page 9\)](#)
3. [Halton MBC and Halton Chamber of Commerce \(Page 12\)](#)

## Case Study: Strategic Development and Organisation - Expect

<b>Case Study: Expect Mental Health Care Charity</b>	
<b>Profile of the project: Strategic reorientation and realignment of people resources</b>	
<b>1. Project title</b>	Strategic Review, Implementation Planning and support to maximise commercial opportunities and organisational efficiency and staff engagement.
<b>2. Type of work</b>	Full Facilitation of a Strategic Review with the Executive Management Team including Chief Officers, Heads of Service and representatives from the Trustees
<b>3. Type of client</b>	Charity/Public Sector: Expect is a registered charity providing health and social care services based in Sefton, Merseyside.
<b>4. Project Location</b>	North West England
<b>5. Project cost</b>	£25,000
<b>6. Project Background</b>	
<p><b>Strategic Context</b></p> <p>When the Community Care Act was passed in 1990, it was envisaged that there would be a great need for housing support within the community. Before the Act came into being, action was being taken locally to identify the housing requirements for people with mental health problems and or learning disabilities. Expect was developed to ensure that wherever possible family relationships and ties would be not only be maintained but also strengthened and developed, in addition to the 24-hour staff support which was available in each of the houses.</p> <p>To support their Vision to become one of the main providers in the voluntary sector to deliver affordable services to people with mental health problems and or learning disabilities, a strategic approach to planning and resource management was considered essential. Taking a commercial approach to sustaining the financial resources available, combined with a review of the effectiveness of the team structure, resources and performance/accountability of defined roles was considered essential in ensuring the delivery of their vision.</p>	
<p><b>Strategic Business Planning and Staff Engagement Programme</b></p> <p>Business Doctors working in collaboration with the Executive Management team designed a programme to facilitate a more inclusive Strategic and Business Planning process.</p> <p>The programme sought to develop an understanding of how to implement the changes required to their individual and collectives roles enabling this change management process to be fully embraced and supported across the whole team.</p> <p>The programme involved the following elements:-</p> <ul style="list-style-type: none"> <li>• Business Vision – Mission Statement development and “buy in” to common goals;</li> <li>• Environmental Scanning- future proofing the strategic plan by PESTEL style assessment;</li> </ul>	

- Market Audit- identification of opportunities, challenges and emerging synergies in sport, recreation, community cohesion and health improvement agendas;
- Feasibility and Financial Resources- auditing the organisational capacity, capabilities and credentials to deliver the strategic goal;
- People Planning and Organisation- assessing the personal contribution and developing the culture of shared aims and joint working;
- Implementation, Measurement and Control- implementing structured and systematic means to determine impact and outcomes and the legacy target at time expiry.
- Engagement with staff to create full involvement and participation, leading to team and individual ownership of the change process and a motivated approach to its implementation.

### **Key Challenges faced and overcome**

As an established charitable organisation focussed on delivering care, a natural resistance had become embedded within the team to any changes that could be considered to place a “commercial” emphasis on either financial or individual performance.

The challenge was therefore to engage, initially at an Executive Management level, through a process of facilitation and support, which encouraged positive and open participation and overcame and perceived threat to their charitable approach and individual roles.

This challenge was addressed by stimulating a willingness to contribute to the process at all levels, and taking a collaborative approach to supporting teams and individuals in aligning their personal aspirations to the opportunities created by the development of the organisation.

### **Outcome and key Learning**

Our intervention enabled the Executive Team to create a coherent, commercially focussed strategic plan delivering financial growth and future sustainability, with a clear programme for implementation and pragmatic approach for engaging the staff in a programme of positive change. This was followed by...

- Fully facilitated Staff Engagement Workshops
- Redefined responsibilities and accountability to the Strategic Plan;
- Alignment and engagement with the roles of the core team with the Strategic Plan.

A Strategic Plan and Strategic Review report was published with specific recommendations to all partners on the way forward with key actions.

The charity established a revised structure with clear accountability and performance management process leading to a growth in funds, improved service capacity, and a more sustainable financial approach to managing and maintaining their reserves.

### **Reference**

**Marc Evans | Director Expect Limited – (Now Retired)**

## Case Study: Coaching Local Strategic Partnership (LSP) Boards

<b>Case Study: Merseyside, Cheshire and Warrington Sports Partnership Boards</b>	
<b>Profile of the project: Strategic visioning and coaching multi-agency working</b>	
<b>6. Project title</b>	Strategic and Partnership Planning Support and Strengthening Consultancy for two Sub Regional Partnership Boards on behalf of Sport England
<b>7. Type of work</b>	Coaching support to strengthen Strategic and Partnership Planning arrangements for Elected Members and Local authority Chief Officers, Heads of Service and representatives from the sport, recreational management and wider community
<b>8. Type of client</b>	Public Sector: Local Strategic Partnership bodies in Merseyside as well as Warrington and Cheshire Regions
<b>9. Project Location</b>	North West England
<b>10. Project cost</b>	£20,000
<b>11. Project start/end date</b>	March 2009 to March 2010
<b>7. Project Background</b>	
<p><b>Strategic Context of Government Policy on Sport, Recreation and Health Agendas</b></p> <p>A strategic objective was to ensure all partners understood the “New Word of Sport” in the UK as well as strengthen the integration of sport, recreation and health improvement services with the Olympic legacy arrangements.</p> <p>This goal would be achieved by greater partnership working at the city and at sub-regional and county levels.</p> <p>In addition, the aim was to review and clarify the role, contribution and responsibilities of Local Authority Elected Members, Chief Officers, Heads of Sports and Recreational Services in district and county authorities. These public bodies would combine their governance arrangement and strategic planning with sporting bodies and third sector members in two sub-regional areas of the North West of the UK.</p> <p>As a consequence of emerging policy developments, the strategic coaching project was to create and develop a common understanding of the evolution of the county sports partnerships bodies in the run up to the 2012 Olympic Games. Also, to create a countywide culture of “cross district” collaborative planning and strategic engagement.</p>	
<b>Strategic Business Planning Programme</b>	
<p>Business Doctors working in collaboration with the Partnership Boards and following a diagnostic needs assessment designed a programme in each Partnership area to support each Board in creating a more inclusive Strategic and Business Planning process.</p> <p>Also, the programme sought to develop an understanding of how to implement the changes required to their individual and collective roles to make this “change management” exercise a reality.</p> <p>The programme also recommended the establishment of clear and appropriate impact measurement techniques to record improvements in participation in sport as well as health related gains.</p> <p>The coaching programme involved the following elements:-</p>	

- Business Vision – Mission Statement development and “buy in” to common goals;
- Environmental Scanning- future proofing the strategic plan by PESTEL style assessment;
- Market Audit- identification of opportunities, challenges and emerging synergies in sport, recreation, community cohesion and health improvement agendas;
- Feasibility and Financial Resources- auditing the organisational capacity, capabilities and credentials to deliver the strategic goal;
- People Planning and Organisation- assessing the personal contribution and developing the culture of shared aims and joint working;
- Implementation, Measurement and Control- implementing structured and systematic means to determine impact and outcomes and the legacy target at time expiry.

### **Key Challenges faced and overcome**

The aim of the coaching project was to create and develop a common understanding of the evolution of the county sports partnerships bodies in the run up to the 2012 Olympic Games.

Also, create a countywide culture of cross district integration and collaborative planning and strategic engagement.

This challenge was addressed by stimulating a willingness to contribute to shared sub-regional and county level objectives that may run counter to area and district based sporting priorities.

Third sector bodies and sporting bodies and federations felt disengaged from the policy and strategic debates because of their single sport remit or mandate.

The challenge for the programme was to shift the emphasis of the board meetings from a one- way governance based communication forum to an interactive “decision making” executive that embedded joint working into their organisations.

### **Outcome and key Learning**

Our coaching provided all partners and programme participants with the knowledge and confidence to contribute to the overall working of the executive.

Thereafter, the Partnership would strive for a balanced input from all partners and sectors as well as learning to promote a culture of two-way communication between all stakeholders for a common aim. Therefore, the programme put in place:-

- Effective governance systems, standards and organisational structures and working groups;
- Assigned role and responsibilities and accountability to the Strategic Plan;
- Alignment and engagement with the roles of the core team with the Strategic Plan.

A Strategic Plan and Strategic Review report was published with specific recommendations to all partners on the way forward with key actions.

The Partnership established a revised Structure and governance arrangements that met the needs of all stakeholders and Sport England as the sponsoring and funding authority.

### **Reference**

**Jean Stephens | Director Merseyside Sports Partnership**

**Unit 1, Dakota Business Park|Skyhawk Avenue|Garston|Liverpool|L19 2QR**

**T: 0151 427 3826 | F: 0151 427 3779 | M: 07713 415 330**

**[j.stephens@merseysidesport.com](mailto:j.stephens@merseysidesport.com) [www.merseysidesport.com](http://www.merseysidesport.com) [admin@merseysidesport.com](mailto:admin@merseysidesport.com)**



Cheshire & Warrington Sports Partnership  
 Wood Street, Colgate 1,  
 Wood Farm, Newton Chalmers,  
 Huddersfield,  
 Cheshire, HD9 4BB  
 Tel: 01484 873122  
 Fax: 01484 78000  
 Email: [approach@cheshirewarrington.org](mailto:approach@cheshirewarrington.org)

**The Business Doctors Ltd**

Business Doctors Ltd was invited to undertake a review of the strategy and organisation of the Cheshire & Warrington Sports Partnership with a view to identifying what the company needed to do in order to make it fit for purpose to meet the developmental challenges of the next five years.

Business Doctors Ltd did an excellent job. They were thorough and professional. They worked with us to develop a blueprint and strategy, and a coherent form of organisation to develop both long term and intermediate objectives.

They organised a highly successful Board development day and challenged the company to examine its own purposes and structures to identify and achieve its goals. The activity led to a more effective development plan and the creation of a new organisational structure, both of which have now been successfully implemented.

The strength of Business Doctors Ltd is the clarity of their analysis, and the effective and direct way in which they suggest solutions. The solutions arrived at came as a result of a mutual identification of issues and problems. This cooperative approach has been highly successful and we are grateful for their very effective contribution to the construction and implementation of a new form of organisation which is now more suited to the tasks which lie ahead.

Signed *D. J. Newton* Date 28 April 2010

Chair  
 Cheshire & Warrington Sports Partnership Board

## Case Study: Coaching Business Growth Techniques

Case Study: Halton MBC and Halton Chamber of Commerce	
Profile of the project: Business Coaching to the Halton SME sector	
<b>1. Project title</b>	Halton Business Growth Strategy
<b>2. Type of work</b>	Coaching support to Small Medium Enterprises (SME's) to strengthen business processes and planning skills and knowledge
<b>3. Type of client</b>	Public Sector: Local Authority working jointly with the Chamber of Commerce for Halton
<b>4. Project Location</b>	Halton District (including Runcorn and Widnes)
<b>5. Project cost</b>	£5,000
<b>6. Project start/end date</b>	Month 2011
<b>7. Project Background</b>	
<p><b>Strategic context of business support to SME sector</b></p> <p>The key aim of this partnership venture between Halton Chamber of Commerce and the Local Authority was to accelerate business and strategic planning knowledge and skills in the SME sector for Widnes and Runcorn.</p> <p>The initiative also sought to strengthen SME sector to better withstand the economic downturn and be more agile in their strategic and business decision making.</p>	
<p><b>Strategic Business Planning Programme</b></p> <p>Business Doctors working in collaboration with the Chamber of Commerce and District Council provided a series of business improvement workshops to strengthen the economic resilience of the SME sector.</p> <p>The workshops were attended by 20 delegates from new and recently established “start-up” enterprises including an employment agency, health services, facilities management and construction as well as nuclear engineering.</p> <p>The Business Growth programme incorporated easy to understand approaches to business planning and strategic management techniques. The systematic and structured programme of participative exercises ensured course participants gained the full benefit from this tried and tested approach to business planning and strategy.</p> <p>The coaching programme focused on these principle outcomes:-</p> <ul style="list-style-type: none"> <li>• Defining the core values of the business;</li> <li>• Defining the core purpose;</li> <li>• Creating a Business Vision and Business Plan;</li> <li>• Undertaking a “future proofing” assessment of the business</li> <li>• Knowing the market and the commercial opportunities.</li> <li>• Embedding business knowledge to sustain enterprise and growth</li> </ul>	

Our Business Coaches used a “interactive” programme of participative engagement and the sharing of experiences to enhance peer learning. Programme delegates shared their successes, challenges and failures as a way of facilitating peer and collaborative learning styles.

### **Key Challenges and Learning**

A key aspect of the Business Growth project in the Halton area was to engage with a wide range of sectors with varying levels of prior business knowledge from construction, manufacturing and the service sectors.

Additionally, the range of experiences from early stage ventures, fledgling businesses to more established companies may have been a challenge with a less structured workshop format. Our approach produces a clear Strategic and Next Steps Action Plan from a series of interactive and structured exercises.

The exercise findings and personal action plans are captured within a Business Growth Workshop Booklet that helps the course participant navigate and undertake key tasks after the course has been completed.

The delegates build their business confidence as a consequence of simplifying the stages required to produce a clear Business Plan and Strategic Vision of their end goal and the steps required. The programme accelerated their business “know how” and embedded core business thinking into their decision making routines.

Therefore, the key learning from the programme is the simplicity of our approach and the interactive exchange of ideas and experience which produces better learning outcomes for the course participants. All learning and feedback is captured in the Business Growth Workbook that serves as an “Aide Memoire” to their plans for a sustainable business future.

### **Testimonial**

“It involved group work which I find a bit scary, but once I engaged with others, we were encouraged to swap best practice and ideas. I found this worked really well. It’s amazing how by talking to other businesses you find lots of tips and ideas. The session was well run and facilitated by Business Doctors who kept the whole thing flowing and interesting. They really got us working and thinking outside the box”.

Valerie Allen  
General Welding Supplies

### **Reference**

Paula Cain, Chief Executive  
Halton Chamber of Commerce and Enterprise  
The Heath Business and Technical Park  
Runcorn, Cheshire, WA7 4QX  
Tel: 01928 516145  
Fax: 01928 516144  
E: [paula.cain@haltonchamber.co.uk](mailto:paula.cain@haltonchamber.co.uk)