

## Organisational planning and performance integration in a TAFE context

DENISE BELL

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NCVER NEW RESEARCHER AWARD RECIPIENT

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# About the research



## *Organisational planning and performance integration in a TAFE context* by Denise Bell

One of NCVER's research objectives is to build the research capacity of the vocational education and training (VET) sector. To this end, NCVER sponsored seven new researchers to attend NCVER's 2007 'No Frills' conference. One of these awards went to Denise Bell. This paper is based on her presentation at the conference.

Finding productive ways to manage change is a challenge for all organisations. *Organisational planning and performance integration in a TAFE context* by Denise Bell details a change management strategy developed to assist two technical and further education (TAFE) institutes. It looks particularly at addressing and improving each institute's planning culture.

The researcher worked with teams in both institutes to develop strategies for effectively implementing a planning framework. Her report examines the principles that underpin the development of a culture of planning in TAFE.

## Key messages

- ✧ There are three key phases to developing and changing organisational practices. These phases are: planning, implementation, and continuous improvement.
- ✧ Sound planning can effectively direct, guide and engage staff to assist an organisation in developing its change management processes. Plans can also assist with the management and implementation of strategies to continuously improve organisational practices.
- ✧ Converting the organisational plan into actions for implementation is critical for change to take place.
- ✧ A high level of staff involvement is needed when leading organisational change, and teamwork is a key element in change strategies. Staff members play a key role in finding solutions to problems and also testing and embedding these solutions.

Tom Karmel  
Managing Director, NCVER

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# The project

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## Introduction

Technical and further education (TAFE) in Australia has changed significantly over the past decade and all indications are the rate of change will continue. Waters (2005), Mitchell and Associates (2003) and Mitchell and Young (2001) highlight that change has become an integral part of organisational operations, particularly in the vocational education and training (VET) sector. This paper describes work undertaken within a dynamic and responsive education training provider whose objective was to continuously improve its planning practices.

This research began in 2000 and was undertaken in the workplace, in a TAFE context which spanned rural, regional and metropolitan communities. The formal writing of the project is contained in the author's doctoral thesis.

## Project focus

The focus of this project was to change and improve the planning practices and culture of an organisation which consistently formalised its planning documentation, checked its progress and reflected on its practices across all organisational levels. This project involved two TAFE institutes, namely Onkaparinga and South East Institutes of TAFE in South Australia, referred to as the Alliance in this paper. A change management strategy was used to develop a planning and performance framework designed to integrate and improve its practice. The actions involved used a broad range of learning strategies and planning tools across the different operational structures in the Alliance. A set of operating principles resulted from the research analysis.

The researcher was based at the South East Institute of TAFE, and the researcher's initial role focused on planning and analysis at a senior management level for the Alliance. It was within this role that the researcher became more aware of the Alliance's need to change and develop its systems to continue to demonstrate compliance with external quality audits.<sup>1</sup> The Alliance Director strongly supported the development of an Alliance planning culture through the use of a planning and performance framework.

During the research the focus was on how to use change management practices to integrate the Alliance's planning and performance framework, while developing its planning culture and practices.

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<sup>1</sup> During the external quality audits of the mid-to-late 1990s both Onkaparinga and South East Institutes of TAFE had issues of planning identified as non-compliant and were offered opportunities for substantial improvement. Reports from 1999 and 2000 *Quality validation reports* for both South East and Onkaparinga Institutes of TAFE in South Australia (TAFESA) further documented this issue.

# Methodology

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The research has been documented as a case study. Action learning/action research methodologies were used to structure collaborative problem-oriented workplace issues and involved changing previous practices, as highlighted by Mitchell, Henry and Young (2001).

Action learning/action research methodology is characterised by the creation of new knowledge from iterative cycles of learning experiences. These learning experiences often include the phases of planning, reflection, investigation and action, as well as the review of progress, as new ways of operating are explored and implemented. The actions involve integrating workplace learning using team strategies (Swain 1999; McNiff 2000; Clarke 1993). Strategies result in developing and increasing the potential of individuals, work groups and the overall capacity of the 'organisation'. Kemmis (2000) and McNiff (2000) argue that the use of action learning/action research involves iterative cycles of activity, often inside the main objective. Activities provide the evidence to interpret and make sense of the workplace issues and to introduce improvements.

A project management approach was used in this project and assisted in leading and managing the many mini-cycles of learning and research often occurring simultaneously within each of the four cycles of the case study. Within each cycle many activities emerged with additional interactions. These additional interventions impacted on the development and implementation of the planning framework for the Alliance.

This paper provides an overview of some of the literature, as well as the research findings as they related to a complex, dynamic and changing workplace environment.

## Research questions

The primary research questions were:

- ✧ How can a culture of planning be built into a TAFE institute?
- ✧ What strategies are effective in implementing a planning framework?
- ✧ What principles underpin the development of a culture of planning in TAFE?

Further supporting questions were identified during the research as being both technical and process-oriented. The technical question related to the content of a planning framework for the Alliance and required research in order to produce the final product.

The need for process-oriented questions also became apparent. Facilitating an environment in which staff could develop the kinds of knowledge and skills required as they became involved in the development and implementation of this project was a critical aspect. One key issue was how to create ownership of and commitment from workgroups to ensure their activity was embedded in their daily business. The detailed questions identified were:

- ✧ How was the planning and performance of the organisation integrated into daily activity in a way to assist individuals, workgroups and the organisation meet the organisation's business plans and targets? Therefore, what processes and tools were required for groups to monitor their plans and achievements against those plans?



- ✧ How are staff able to influence changes made to systems, to assist them to gain the knowledge and skills to monitor their performance against their plans?

## Research processes

Four major action learning/action research cycles made up this project as indicated in table 1. Each cycle involved a process during which action plans were identified and their implementation managed and monitored. A number of sub-activities, as indicated in table 2, made up each cycle's activities. The results of the actions were observed, recorded and reflected on by those involved and those with specific responsibilities associated with each of the action activities. The solutions identified focused on improving the Alliance's planning culture—initially for the whole organisation—while the final cycle was focused at an operation level within a faculty in the Alliance.

**Table 1 Research action cycles**

Action cycles	Cycle title
Cycle 1	Establishing data benchmarks
Cycle 2	The Alliance review
Cycle 3	Planning and performance integration
Cycle 4	Working at an operational level

Source: Bell (2004 cited in Bell 2007).

Consultation and investigation with key participants were ongoing aspects for each cycle in this work. An essential part of this process was gaining commitment and input from key stakeholders throughout the project. Briner, Hastings and Geddes (1996) and Sankaran (2001) highlight that the critical phase for any project is ensuring commitment by the sponsor and stakeholders. During all the phases of design, development, trial, review and implementation, this consultation was used to change and continuously improve the Alliance's planning culture and to ensure that the organisation supported and offered ongoing commitment to the project. Table 2, collated by Bell (2007) highlights the diverse number of people involved, the different types of data used and developed and the number of meetings involved in each of the cycles.

**Table 2 Project cycle action statistics**

Cycle	No. people	No. data/products developed	No. of meetings: planned	No. of meetings: ad hoc
1	37	5 different data sets Report proforma 2 annual reports	4 meetings 2 presentations	Many
2	60	13 different data sets Report	1 meeting per week for 10 weeks 2–3 meetings per week	Regularly 2 per day
3	21	2 annual planning resources 3 annual planning report processes Planning & performance framework 3 diagrammatic representations	12 meetings with different project tasks 2 presentations 4 executive meetings	Regularly at least 2 per day
4	65	3 discussion papers Continuous improvement system Report	10 meetings 4 workshops 3 presentations	Many

Source: Bell (2007).

It should be noted that there was not one process and/or strategy that provided a consistent approach throughout the research activities. Rather, what emerged was dependent on the situation and circumstances at a given point in time and place. Often it was 'messy', very busy and sometimes 'exploded' in various directions. Senge et al. (1995) rightly insist that in any process of large-scale change we cannot expect that any one person will have the answers; rather, the answers

will emerge out of the collective experiences and sense-making of people working together. The principle of shared leadership and teamwork was consistently employed throughout the four cycles of this research project. Active consultation, involving a diverse range of people across the organisation (Kotter 1995, 1999) and planning the change strategies together (Morden 1989; Huy 2001) were constant principles employed. These principles evolved and emerged as the cycles occurred, not necessarily in a sequential manner.

# Research outcomes

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A range of significant outcomes were achieved in developing and implementing the integrated Alliance Planning and Performance Framework. These outcomes can be found in the processes used to develop the products and tools and the principles that resulted from the reflective processes on the project.

This research did not focus in depth on the theories of strategic planning, but rather on the implementation strategies required to change, develop and improve an organisation's planning culture. A number of planning tools were created and steps identified during the project. These were:

- ✧ implementation of *Partners in progress 2001–2004*
- ✧ annual planning processes by divisions and faculties
- ✧ consultation process of the Alliance Review
- ✧ organisational assessment report and recommendations
- ✧ performance review framework—macro level
- ✧ project investigation and recommendation of productivity reporting format
- ✧ financial and planning (FAP) 2002 folder resource for all managers
- ✧ faculty continuous improvement system.

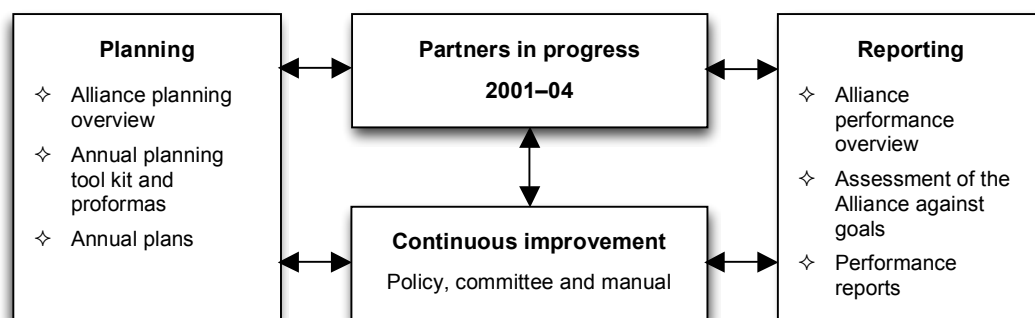
The framework embedded these tools and used a continuous improvement approach to integrate its planning and performance practices across the Alliance. The resources produced provided the Alliance with a range of data and information to contribute and use in the decision-making processes for future planning directions, annual planning priorities and operational actions, including reporting and monitoring performance. In the final cycle, operational systems were created to support a faculty review, as it refined and improved its operational planning and performance. The types of resources developed are shown in table 3. These products were the result of many discussions, consultations, meetings, appointments, phone calls and hard work by a number of different staff who actively participated in the change management and continuous improvement strategies and activities of this project. In addition, table 3 highlights the diverse roles occurring for the researcher during the project.

**Table 3** Role of researcher in the development of products

	Researcher	Facilitator	Developer	Manager	Writer/ editor	Est %
Organisational self-assessment summaries	✓	✓		✓	✓	80
Council reports	✓	✓	✓	✓	✓	70
Data collection	✓	✓		✓		90
Alliance review	✓		✓	✓	✓	80
Analysis NCVER Graduate Survey 2000		✓		✓		100
Regional community statistics by campus 2000	✓	✓	✓	✓	✓	80
Planning tools	✓	✓	✓	✓	✓	100
Productivity reports		✓		✓		100
Financial Activity Plan folder 2002 development		✓	✓	✓		70
Planning and Performance Integration Framework	✓	✓		✓	✓	90
Information Industries & Applied Design faculty Quality Task Team workshops and feedback 2003		✓	✓	✓		100
Information Industries & Applied Design faculty quality journey	✓	✓		✓	✓	70
Information Industries & Applied Design faculty record of quality journey		✓	✓	✓	✓	90

Source: Bell (2006 cited in Bell 2007).

In analysing the planning and performance integration, the following figure diagrammatically shows the different product groups that contributed to the Alliance's Planning and Performance Framework. Figure 1, developed by Bell (2001 cited in Bell 2007) shows the alignment of the Alliance's planning process to its performance review processes and displays the link to the Alliance's quality assurance structure. It also diagrammatically displays where the planning and reporting elements integrate and support the Alliance strategic plan. Sitting behind the reporting processes, for example, are a range of tools (Bell 2001 cited in Bell 2007) outlining annual timelines and reporting actions to guide and monitor the performance of the Alliance against its plan. These reporting actions identify what quarterly reports are required, who is responsible for their production and what groups require which reports.

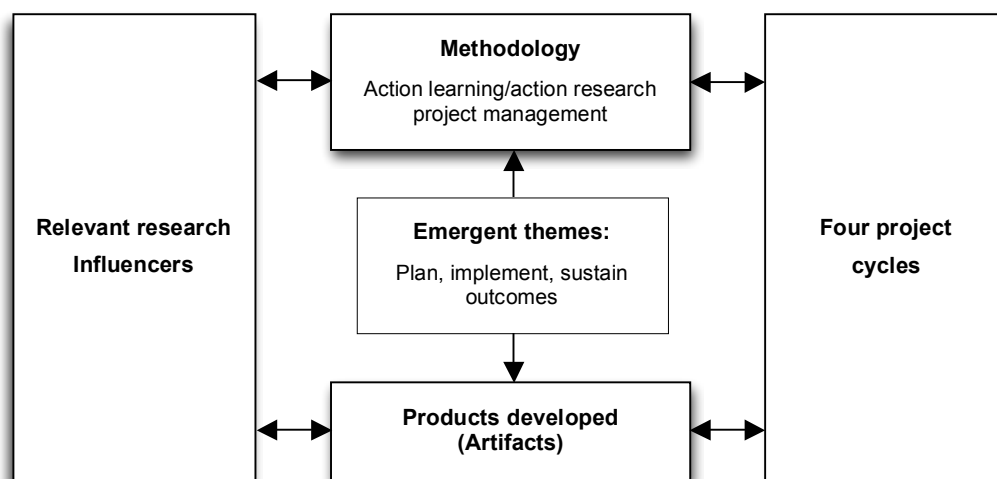
**Figure 1** Planning and performance integration

Source: Bell (2001)

## Findings

Further to the initial set of questions that began in this project, an additional question emerged during the process. This question focused on the emergent themes and their related principles. The emergent themes of ‘plan’, ‘implement’ and ‘sustain outcomes’ underpin the continuous development and implementation that assisted in changing and improving the Alliance’s organisational planning practices. Professional judgement involving processes and actions was an important aspect in managing change in the workplace. Figure 2 highlights the connections from an academic point of view.

**Figure 2 Influences of emergent themes**



Source: Bell (2004 cited in Bell 2007).

The emergent themes of organisational planning, implementation and sustaining outcomes have been underpinned by guidelines identified as key principles and processes. These themes became an integral part of the development of the project’s products from the cycles of action learning/action research. However, in the development of each of the cycles, further activities of plan-act-observe-reflect occurred, often simultaneously and not in a step-by-step order. Each of the actions became intertwined with the next steps of observe and reflect. Re-planning often occurred as the new activities emerged from the previous actions.

From the key emerging themes of ‘plan’, ‘implement’ and ‘sustain outcomes’ (Bell 2007), guidelines have been identified to assist an organisation to develop its capability and capacity to improve its performance to respond to students, industry and other internal and external demands. These principles assisted in imparting increased understanding of the events that occurred in the project to the stakeholders. Reflecting on the capacity of the project as a tool to facilitate understanding and learning while engaging others in the wider community of the Alliance involved an iterative continuum of learning and development.

As a consequence of the development of the research’s key findings, the researcher tested these further. During the NCVET ‘No Frills’ conference in 2007, participants attending the presentation responded to the following two questions:

- ✧ What are the processes you would use to *plan* for a new innovative project in a VET workplace?
- ✧ What are the processes you would use when *implementing* a new innovative project in a VET workplace?

Table 4 identifies the results of the feedback from the 20 highly experienced vocational education and training practitioners attending the presentation. The responses indicate a close alignment and synergy with the findings from this research.

**Table 4** Conference participants' response to questions

Plan	Implement
Conceptualise the idea and identify the need	Funding ✧ What have you got? ✧ Where can you get more?
Research idea to gather relevant data	Continue to gain management support
Sell the project and obtain senior buy-in	Develop a users' communication strategy and engage people ✧ Where does the project fit? ✧ Identify longevity of project—communicate ✧ Clarify roles and responsibilities ✧ Communicate shared ownership—all areas and staff ✧ Sell the benefits
Align to business strategy	✧ Find your champions ✧ Delegate and devolve ✧ Find the team leaders and influential leaders
Run a think tank—obtain a reality check	Establish feedback mechanisms, including milestones & significant events
Go/No go—assess risk and identify its size	Action plan throughout implementation—links into strategic plan & identifies risks & obstacles
Develop project brief to include: ✧ high-level outline ✧ cost-benefit ✧ resources ✧ evaluation	✧ Support users by being 'on board with them' as they make it work—be flexible ✧ Give ownership in the implementation process ✧ Avoid 'silos' & use cross-team/sectoral involvement
Complete approval process	Develop strategic partnerships/alliances with other groups, teams
Obtain senior management buy-in and sponsorship	Have some 'critical friends' Allow and learn from mistakes
Sell project to users	Sell the benefits to the 'organisation'
Manage staff expectations/resistance	Cover your bases e.g. internal auditing
Source other funding	Have the right systems in place Establish review and evaluation actions

Source: Bell presentation (July 2007).

The findings from this research have been summarised in table 5.

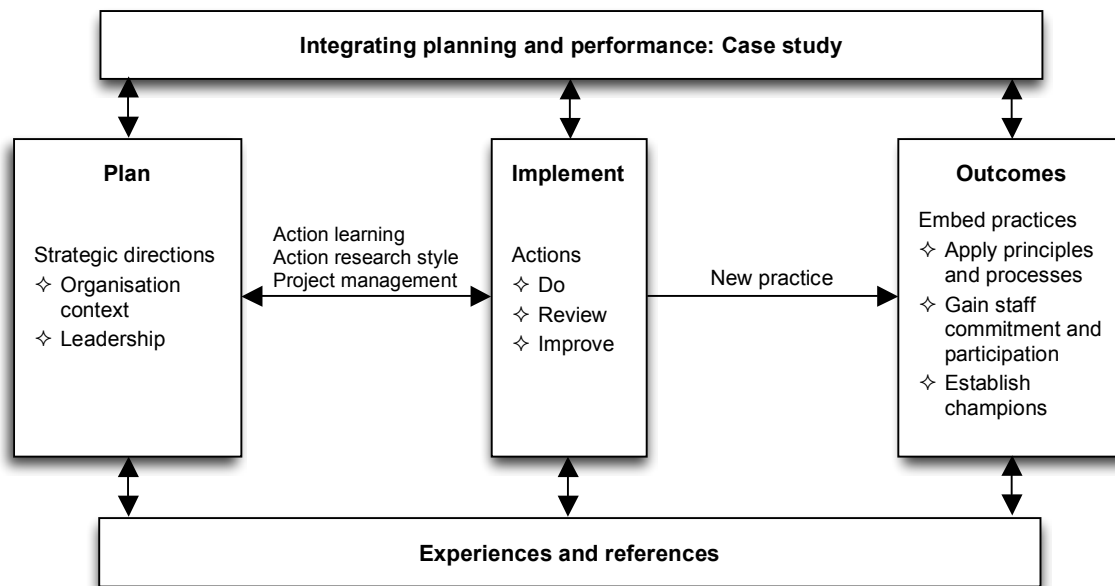
**Table 5** Emergent themes and principles

Emergent themes	Emergent principles
Plan	Model used is dependent on leadership from the top Apply strategic thinking throughout all phases of activity Plans are tools to assist organisation development and direction Plan an implementation strategy
Implement and review	Create an educative focus and environment No one solution/process/model fits all situations Know the organisation and its business Involve staff
Sustain 'new' practice	Use continuous improvement approach Embedded performance requires ongoing commitment and support by all

Source: Bell (2007).

Table 5 identifies the themes and principles that have emerged from the project's experiences. The full exegesis identifies the processes and discusses the importance of sustaining 'new' practice. It explores the processes of an organisation's ongoing commitment to supporting and sustaining organisational learning and development, as well as ensuring relevant resources are available to assist and sustain change management improved practices (Bell 2007). Figure 3 diagrammatically shows the findings and the core themes that have emerged from this project and its reflective actions.

**Figure 3 Integrating planning and performance—case study**



Source: Bell (2007).

Given that there are different kinds and levels of planning that organisations undertake, planning in this project was done when it needed to be done and integrated into day-to-day operations as best as could be managed. Planning always took place in consultation with the key stakeholders. Whether planning was undertaken at the macro level within the organisation, at the tactical level in determining the implementation of the strategic direction, or at the work group or personal level, the development of the planning process and its product became an important tool in providing directions, actions and commitments, which the relevant groups and individuals used in implementing their business activity. This was in accordance with the work of Michaluk (2002), Hamel (1996), Senge et al. (1995), Kotter (1995), Kanter (1989) and O'Regan and Guobadian (2002), who support performance strategies being developed as part of the planning process. The integration of performance outcomes became an essential aspect of the planning process.

However, as the analysis and reflection suggest, strategic planning alone is insufficient when attempting organisational change management. Integrating the plan and its processes into actions for implementation was critical for change to take place. Teamwork is suggested by Rylatt (2000, p.xx), Callan (2001, p.11) and Fraser and Novak (1998, p.109) as a key characteristic in a change strategy designed to stimulate growth and achievement within the organisation. McNiff (2000, p.81) suggests that people who share ideas and create meaning develop an educative culture, where relationships foster learning.

Plans became the tools to direct, guide and engage staff, and assist an organisation to develop its processes to manage and implement strategies to make changes to past practices and continuously improve practices (Schraeder 2002; Huy 2003; Coulthard, Howell & Clarke 1996). Using teamwork to solve the workplace problems greatly assisted the actions taken and provided opportunities for the team and its members to improve their practice, as have also been identified by Callan (2001), Kotter (1999), Miller (2003), Rylatt (2000) and McNiff (2000).

# Conclusions

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Throughout the project the researcher worked in partnership with staff, using different teams as each new problem was identified. From the diverse problems addressed, a variety of tools and products were produced, where each related to the type of activity being undertaken at the time (Mitchell and Associates 2002; Skippington 2002). These strategies involved a high level of staff participation, as Callan (2001) suggests is needed when leading organisational change. It was critical to use a diverse array of tactics and skills (Mitchell and Associates 2002; Johnston & Hawke 2002; Rylatt 2000) during this change management initiative.

In effect the project's experience and the relevant research literature remind us that planning is not linear, rather a social process of reconstructing practices (Kemmis 2000, 1995; McNiff 2000; Mitchell 2003). The actions in the project emerged as a result of dynamic and ongoing exchanges, supporting further Mitchell and Young (2001) comments. One cycle became part of a wider pattern in a network of interconnecting activities in both form and practice. The experience was iterative and required constant review and reflection on the many cycles of plan, act and review actions as they occurred, often at a rapid pace.

Initially, it appeared that the research reviewed had few themes in common, as each group specialised in different aspects and issues. However, the key points from each specialist area emerged from the methodologies and were used to develop and manage the project's activities. These activities occurred in a work-based learning environment and were key elements of the workplace change process which Mitchell and Associates (2002), Billet (2001), Skippington (2002) and Matthews (1999) identify in their work. The themes and principles that emerged highlight that there is no one straightforward strategy, solution and or answer to addressing a practical issue. This was further highlighted by other writers such as More (2003), Senge (1999, 2000), Rylatt (2000), Mitchell and Associates (2003) and Hou (2003), where the context and situation are significant contributors to address a way forward.

The doctoral thesis developed in response to this research looks at and discusses the interplay of the literature researched and the project's experiences. It explores the interconnections between the theory of workplace learning, organisational development, change management and action learning/ action research methodology and the practice experienced in the project (Bell 2007).

## Postscript

During the period of completing the research of this project, policy changes within TAFESA resulted in the termination of the Alliance, separation of the institutes and a re-organisation of the structure of TAFESA. This project nevertheless had an impact on the development of each institute's planning, as well as on the manner in which managers reviewed their planning resources and practices. As a secondary benefit, the researcher gained an enormous professional development opportunity as leader and participant in the project and its developments. As a consequence of her reflections, she has learnt to improve her own practices and obtained increased insight in operating within complex, dynamic organisations. The themes and principles identified continue to assist in developing her workplace practices.



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