

National Disability Workforce Project

Pilot Site Report

“Managers are the key to Retention” The Barkuma Management Learning Program

Barkuma Inc.

Workforce issues targeted:

Feedback from staff satisfaction surveys pointed to the significant role managers and team leaders have in the retention of staff. Put simply they were seen as the “key to retention”.

The following bulletin points provide an overview of a number of the key internal and external environmental factors that raise the profile of the “retention” debate and focus our attention on our need to continue to invest in our middle management/team leaders. The Barkuma Management Learning program, is one part of this initiative.

1. A decentralised model

Barkuma has traditionally had a decentralised decision-making structure. This has meant that decision-making has remained as close as possible to the client and has been a key ingredient in determining a high level of client focus. Feedback from our job satisfaction surveys equally shows this is of “high value” to our staff and contributes significantly to perceptions of job satisfaction and ongoing retention. In a structural sense, however, it has historically also contributed towards a relatively flat organisation structure.

2. An organic approach to career development.

In this decentralised organisational structure career development to team leader and some management positions has traditionally occurred as a consequence of turnover or staff undertaking specific project work; most notably within the non-specialist roles in our operational management structure. As a result there has generally been a more organic and consequently more sustainable management structure.

3. Service Growth

In more recent years however, we have experienced a large increase in the number of clients that we are able to provide a service for. This growth has occurred as a consequence of the success of our services. Further, we are projected to grow our services considerably in forthcoming years.

Within the context of this program, it is important to recognise that this growth in services had not occurred through the acquisition of, or merger with, other disability providers. By, this we have not “imported” different management styles or workplace cultures.

As a result, and in response to service growth, an increasing number of our staff have earned promotion into team leader and middle management positions. They have brought with them a good understanding of services and, significantly, the values base that underpins the delivery of those services. However, what they do not always necessarily bring with them are the wider management competencies, behavioural experiences and underpinning knowledge necessary for a manager in a disability organisation in 2009.

4. Retirements

The retirement profile of the organisation will be another driver towards increased internal recruitment and flow-through into the management classifications in future years.

5. The external environment – maintaining a focus on our values

At this stage it is worth reflecting upon and recognising that our services and managers are increasingly being drawn into major compliance reporting arrangements as part of our funding arrangements. At all levels of the organisation there is a focus upon the service and contract outcomes of our funding bodies (Commonwealth and State).

With this comes the potential danger that we will singularly re-focus how we measure and validate our success as an organisation, or as individual managers. There is, arguably, an inherent danger that in doing so we, and our managers, will begin to value the “business critical” outcomes of government contracts and lose our focus on the importance of our core values.

For the person transferring from a role in a decentralised model in which real social and ethical values and standards (ie organisational core values and the disability services standards) regulate the service delivery in which they participate, this means learning a whole new set of “things to value” and herein lies the danger and potential frustration for middle managers.

6. The impact upon middle managers & workplace culture

Associated with these changes, anecdotal feedback is that the transition into team leader and middle management has increasingly become more difficult and may be impacting upon morale*. This has clear implications for workplace culture and the ensuing retention of staff; particularly given that middle managers are in a unique position to influence workplace culture and the relationship that staff have with our organisation and what it stands for. This is “mission critical” to Barkuma.

7. The Barkuma Management Learning Program.

With this in mind, and within the context of the retention and recruitment dynamics of the contemporary labour market in Adelaide, it is therefore mission critical that our organisational development strategies direct resources to the support and development of our middle management teams. Equally, it is essential that this development marry technical competencies with social and behavioural management practices. This is essential if we are to combine management efficiencies with role model managerial effectiveness. It is also critical to ensuring that our managers “see” and “understand” their role model status and begin to manage their external and internal environments.

Our assumptions:

In relation to this project, the critical assumption is – “that managers (and their behaviours) are the key to retention”.

The second assumption is that the management learning program (as part of a wider organisational development strategy) will be a vehicle that contributes to:-

1. Maintaining a focus on our values focus during a period of growth/change.
2. Promoting the importance of role model behaviours in our management teams.
3. Recognising the need to develop management learning that embraces the socio as well as technical parts of management, but within a Barkuma framework.
4. Retaining staff by maintaining a positive workplace culture.
5. Equipping our managers with the necessary technical management competencies (not based upon service knowledge) to give them the required confidence and underpinning knowledge.

Strategies trialled:

The specific strategies have been adopted to ensure that there is harmony between our performance management systems, our values and our investment in management learning across the behavioural as well as technical aspects of middle management. Specifically the following were, or are in the process of being trialled:-

1. Development separate appraisal /objective setting / PDP process for managers to highlight importance of socio-technical skills and, in doing so, send out a consistent message about what we value. This ensures that the content resonates with the learning we wish to see achieved.
2. Design and roll out the Barkuma management learning program*.
3. Survey participants (possibly use focus groups) and continue to monitor staff perceptions of managers through job satisfaction survey and exit interviews**. (May 09)

[As part of the methodology, Services were contacted and asked to provide feedback on the technical competencies they would like to have their managers develop through this program. The key focus of the Learning Program was then presented to all business managers at the September meeting and some adjustments made based upon their feedback]*

*[** Note: the structure of the job satisfaction survey and exit interviews were aligned in early 2008 prior to the commencement of this project].*

How we measured the impact of our strategies:

The Barkuma Management Learning Program is being rolled out in 2009 (in conjunction with other strategies). The following indicators of measurement were available as at May 2009.

1. Anecdotal feedback

Anecdotal feedback from managers/team leaders has to date been very positive. All sessions continue to be extremely well attended

2. Staff feedback – annual job satisfaction survey.

In May 2009 we undertook our annual job satisfaction survey. The survey, in so far as it focused upon key elements of the program, identified the following:-

1. *General*

- *95% of respondents rated Barkuma as a “good” or “very good” place to work (compared with 91% in 2008).*

2. *Training and Development*

- *81% rated their induction as being “good” or “very good” (compared to 60% in 2008).*

3. *Support*

- *81% of respondents rated the level of support from their management team as being either “good” or “very good” (compared with 68% in 2008).*

4. *Performance Appraisal (Note: at the time of the survey, not all respondents had participated in an appraisal)*

- *67% of respondents rated their level of satisfaction with the performance appraisal as being either “good” or “very good” (compared with 55% in 2008).*
- *60% of respondents rated their level of satisfaction with the effectiveness of the appraisal relative to helping them to improve work performance as being either “good” or “very good” (compared with 49% in 2008).*

3. Staff retention

Staff retention has been good at Barkuma for a number of years (with turnover, including retirements etc, averaging around 12%). The 2008/9 figures will be analysed in July, but based on exit interviews etc the turnover rate is not likely to have increased during 2008/9. This is a favourable result given the extent of organisational change in 2008/9 (See “workforce issues targeted, item 1 above).

Conclusions:

From the data collected, we concluded that:

1. Middle management plays an important role in the retention of staff.
2. Role model behaviours play an important role in the retention of staff.
3. It was very important to connect all our people with the values of the organisation.
4. It was also important for us to work with managers to enable them to recognise and identify opportunities to “live those values” in the way they undertake their day to day operational functions.

Implications:

The implications of our findings so far, were the need to recognise that:

1. Organisational systems and processes that interact with staff are administered by middle managers in a way that resonates with our core values.
2. Maintaining a focus on core values will provide significant benefits to community organisations, their staff, their clients and other stakeholders. These include, but are by no means limited to staff retention and organisational reputation (ie a key aid to recruitment).
3. The need to ensure that what we learn (and our managers learn) is interwoven with, and contextualised in, a statement of our values.
4. An organisation which does not invest in the socio-technical skills of its managers/team leaders is probably choosing to invest in turnover and, ultimately, reduced organisational performance.