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WORKFORCE WHEEL

An outcomes tool to help you support and measure change in people management

Developed by Triangle Consulting for the Workforce Development team at NCVO

THE WORKFORCE WHEEL

The Workforce Wheel takes an outcomes approach to all aspects of people management. The term workforce includes all those people engaged in enabling a Voluntary Community Organisation (VCO) to fulfil its mission – managers, staff and volunteers. It provides VCOs with a clear vision of where they want to get to as they grow into their full potential. Effectively it is a model of a high performing organisation with strong leadership. The Workforce Wheel is one of a family of tools available from NCVO that take an outcomes approach to organisational capacity building. Others include governance and sustainable funding.

The Wheel covers 10 areas in which VCOs need to be effective in order to achieve the ultimate aim – that the workforce effectively enables the organisation to achieve its mission in the world. Within each, it describes the journey from organisations being at risk to excellence.

The 10 areas are:

- Vision and leadership
- Management
- Roles and Responsibilities
- Workforce Skills
- Safety and well being
- Recruitment
- Confidence with conflict
- Clarity about expectations
- Engagement
- Working together

"This organisation is having some major issues where the organisational culture has put the staff and senior management at odds, and so the 'surprise' for them (on completing the wheel) was to see that the low scores were limited to just two areas"

Pilot participant development worker

Who should complete the Workforce Wheel?

Using the wheel is most effective as a joint process involving a range of people - managers, staff, trustees and other volunteers. If you all agree you can be confident that the scores you come up with are reasonably accurate. If you find yourselves disagreeing about the scores, this is a great chance to really explore what is going on, and deepen your understanding.

What then?

Having identified where you are, you can then work up a plan to address the areas you are weakest in and build on where you are doing well. Put these plans into practice, and return to the Wheel in six to twelve months time to reflect on what has changed and what you have done that worked.

How do I complete it?

The Workforce Wheel can be completed with an external facilitator – such as an advisor or development worker – or with an internal facilitator such as a trustee. Either way, it is designed to be completed:

- As a group, through structured discussion of each of the areas
- With one person facilitating
- At least the facilitator needs to read the Wheel and this guidance beforehand

Read through each section and decide which description fits you best – it doesn't have to be exact, and often you will have an intuitive sense of where the organisation should be. Note this down with a date on the score recording sheet (p16), and make any notes that may help clarification later (e.g. where there is major disagreement, or where a score might be high for say staff but much lower for volunteers).

Once you have recorded all your scores, mark them on the wheel so that you can see what shape your organisation's people management is in. The bigger and rounder the shape the better – any missing or short spokes require attention!

There is more than one box to write in your score, this is so that you can return to the wheel in six months or a year's time and write in your score again.

Note about language.
The leaders of VCOs are called many things. We have used CEO for brevity: please regard this as applying to whoever effectively leads the organisation – which may be the chair of the Committee where there are no staff.

Your organisation will be at one of the following five stages on the journey towards excellence in people management. These stages apply to each of the 10 areas.

AT RISK

This describes a situation where your organisation is on very unstable or weak ground – it could appear to operate well for a while but the organisation and/or people are at high risk if anything goes wrong. It is likely that unnecessary time, energy and money are being absorbed in sorting out HR issues or dealing with gaps and inadequacies. Take action now. The leadership challenge is to recognise that there is a problem and help others to see that action needs to be taken.

WEAK BUT AWARE

Here your organisation recognises weaknesses to some extent, and may have some strengths too, but needs help to improve. If you score a 2 in any axis, we recommend that you review your current plans to develop in this area and consider taking further advice to improve practice in this area. Get help to move forward effectively, and consider what support the leader needs to do this. The leadership challenge here is to establish standards and get people involved in owning and supporting these.

GOOD IN PARTS

At this level an organisation is likely to be legally compliant, though not necessarily operating at good or best practice levels.
If you are scoring threes in a number of areas (but higher scores in the rest) it is likely that your organisation would benefit from time and investment in improving these. The leadership challenge is likely to be communication and consistency.

WORKING QUITE WELL

At this stage the organisation is running well in this area – and isn't blocking its own performance through poor systems, structures or procedures. The leadership challenge is to improve through monitoring, reflecting and learning.

EXCELLENCE

Here there is strong, clear leadership, with a real integration between all aspects of an organisation's operations, planning, strategic development and people. It is the leadership, linking and the sharing that really enable the organisation to achieve high performance levels and show that it is truly a cut above its peers and competitors.

1 2 3 4 5

The following tables describe this journey as it relates to each of the 10 areas of people management, giving examples of what might be seen within an organisation at each of the steps on the journey.

	AT RISK	WEAK BUT AWARE	GOOD IN PARTS	WORKING QUITE WELL	EXCELLENT
Vision and Leadership Knowing who we are and where we are going; resilient. A real sense of spirit – clear and inspiring leadership 1	Organisation has little sense of direction or identity.	We are aware that we say different things to meet expectations of different external organisations; sense of organisational coherence gets lost.	We know who we are and why we are here, but we struggle to be this in practice e.g. • Some/much of what we do doesn't really fit our stated aims • We don't always do all the things we have committed to in terms of developing our people.	Our leadership enables us to have a good sense of purpose, values, and goals e.g. • We know when we are doing well and going in the right direction • The link between supporting and challenging our people and our performance is clear.	We feel resilient to external factors; the spirit of the organisation is vibrant and alive e.g. • Managers, staff, trustees and other volunteers have a strong sense of vision and confidence • The leader is visible, and leads our people practices by example.
Management We are organised to achieve results and work effectively, with a reporting and support structure that enables our mission. 2	All decisions and management centralised to overworked CEO or coordinator or no clear structure for decision making process or management (e.g. people don't know who they report to). In addition: • Ineffective or no consultation with staff/ volunteers • Trustees involved in operational aspects of staffed organisations.	We know we aren't organised very well but feel constrained in the choices we have to improve this e.g. • Don't feel anyone else could take on a management role • Don't know how to help Trustees stand back • We like to be equal and operate without a hierarchy but…	We are quite well organised: • Managers generally clear what their responsibilities are and what goes to the CEO/Coordinator • Either supervision and appraisal systems exist but are not fully used, or supervision and appraisal done but without the systems to support them • Link to Board may be weak e.g. some unclear decision making processes.	We are well organised and generally can make decisions well: • Managers have manageable staff /vol. Teams and reporting to Board is clear • Managers understand all policies and are confident to apply them • Understand appraisal, staff development, volunteer management and can do this well.	We are well organised – can make decisions speedily, and with the right level of consultation. • Systems are clear, there are clear lines of reporting, communication, support, development and learning through to the Board • People have confidence in the line management function and structure • CEO/ coordinator uses the trustees effectively.

	AT RISK	WEAK BUT AWARE	GOOD IN PARTS	WORKING QUITE WELL	EXCELLENT
Roles and responsibilities We all (staff, volunteers, Trustees) know what our roles are and what doing them well looks like, at individual, team and organisational level. 3	We do not have clear roles e.g. • No Job Descriptions (JD). • Unclear or inflexible working policies or practices that may be abused by some. • Roles may be historic or overlapping • Weak boundaries e.g. between senior management and Trustees	We need greater consistency: e.g. • Some people have JDs, not consistent or linked to overall vision. • Managers (or volunteer supervisors) may be unclear about their responsibility or inadequately skilled	All staff have a JD, and we use JDs for recruitment: • However, not well linked to competences, performance management or strategy. • Performance objectives may exist but aren't used actively to support and challenge people in their roles. • Some volunteer roles and responsibilities are well defined	We all have clear roles, and we review and update JDs as new staff come in: • Everyone has a clear idea of what excellent performance in the role looks like. • Core competences are defined • Managers can tackle poor performance, backed by policies	We all know what we are doing, and what great performance standards and objectives are at individual, team and organisational levels. • opportunities for continuous learning and progression • Everyone knows how they fit into the overall vision and strategy, • Evidence based assessment of performance • Performance is reported to Trustees
Workforce skills We have the skills to do the job and the scope to learn and develop as needed, through internal and external development. 4	Staff/volunteers lack skills and/or training opportunities and feel unable to do their jobs	Inadequate budget (if there is one): • Tend to focus training on specific problem areas • Or to develop a particular person with promise.	Good at part of the process: • Using competences and JD's to identify need but don't plan or evaluate training well or • Plenty of training but not linked to clearly identified needs • May focus on external training and undervalue internal learning	We are clear what competences people need for each job and work out ways for people to gain these, whether internal or external. • Linked to overall strategy and appraisals. • Staff (or volunteers) recruited on a competence basis. • Managers can use appraisals and supervision to support staff/volunteer development	Each staff member has a realistic personal development plan designed to achieve objectives, competences and performance standards. • Expectations of, and support to, volunteers is appropriate. • Development plans use a range of learning opportunities. • Review and evaluate internal and external training

	AT RISK	WEAK BUT AWARE	GOOD IN PARTS	WORKING QUITE WELL	EXCELLENT
Safety and well-being The organisation takes its responsibilities to staff and volunteers seriously, and values their safety and well being. 5	Unsafe and not aware: • People may be at risk in office or with clients • People are overworked and could burnout without support.	We have concerns: • Suspect a H & S audit would show –or has shown – areas of weakness • We would do more for staff /vol. Wellbeing if we could afford it.	We generally address H & S issues as they arise. • Clear H & S policy and procedures for screening, CRB checks, working alone etc • Have all the right policies but we don't quite put them all into practice	Feel confident that no volunteers, staff or users put at risk through contact with organisation: • Policies and procedures understood and reviewed • Willingness to invest in improvements – e.g. workstations • Adequate reserves to safeguard staff payments etc • CEO pays attention to wellbeing	People taking responsibility for themselves – they can see safety and well-being as contributing to mission rather than a constraint. • People make informed decisions as to how best to act. • Controls ensure that policies and procedures are implemented • Appropriate working patterns and support for work-life balance • Requests for flexible working practices open to all, with clear parameters • Reports to Trustees on H and S compliance • Regular staff/vol. Satisfaction survey
Recruitment *"We can find the right people, and know that we are choosing well"*.Workforce can include volunteers and trustees as well as staff. 6	It is very difficult to recruit good people (whether volunteers, staff or Trustees): • Posts and roles vacant for periods of time. • Poor Equal opportunities policies (EOPs) & diversity policy/ practice	We have difficulty finding people, but can improve systems: • Have good process for some roles , (whether volunteer or staff) others are more ad hoc. • Some internal promotions may be questionable	Good JD/ and person spec process and some use of panels for staff, and generally clear articulation of Trustee and volunteer roles: • Standards not always consistently applied, references generally checked. • Internal promotions may be rather ad hoc. • We don't always get the right person	We feel confident we can choose the right person: • Clear process for both internal and external applications, and for recruiting trustees and volunteers • Panels, work sample tests, recruit to competence based specifications • References fully checked as appropriate and clear probationary period.	We feel confident we are getting the right people and we can find the staff and volunteers we need, even in times of change: • Good selection process using range of techniques, good people recruited, exemplar Equal Opportunities Policies • We use the probationary period for staff effectively when we have made a mistake!

	AT RISK	WEAK BUT AWARE	GOOD IN PARTS	WORKING QUITE WELL	EXCELLENT
Confidence with conflict Managers confident and equipped to deal with conflict so do not fear it. 7	We may have a high level of expressed conflict: • Possible tribunals and legal issues absorbing time and money or a tendency to avoid issues rather than address them. • Few policies or procedures in place to guide managers.	We recognise that there are issues that have not been addressed – e.g: • Working around a difficult team member, rather than tackling behaviour. • Limited support from existing policies, so people don't feel they have the confidence or knowledge to do this	We are quite confident, but not always: • Our managers are generally trained in how to apply most of our policies • Confidence may vary and some underperformance or poor behaviour or absence may continue.	Managers feel confident to apply policies consistently, and they are understood by staff and volunteers. • Underperformance, poor behaviour or absence are addressed reasonably quickly • People know when to ask for advice. • Differences of view welcomed as a creative input.	We can handle conflict effectively e.g. informally where appropriate. • Managers are skilled and timely in dealing with performance issues • Disciplinary and grievance procedure understood by everyone. • Managers implement them consistently and fairly. • Equal opportunities and diversity policy understood by people and embedded throughout the organisation.
Clarity about expectations *"I know what the organisation expects from me and what I can expect in return"* 8	We don't have a clear expression of expected behaviour or performance: • Staff/volunteers not behaving as expected • No code of conduct or absence policy, weak monitoring. • People may not take leave entitlements. • May have high levels of sickness or other absences • Responses to behaviour by management are inconsistent	Behaviour and or, attendance levels are a problem eg: • Policies not up to date or understood. • Uptake of leave is very low. • People may be enthusiastic but not always reliable	We do have a code of conduct in place, plus policies set out re expected behaviours and code of conduct, taking holidays, sick leave and other absence, but: • People may not be following them. • Performance expectations may not be clear. • Managers apply policies inconsistently e.g. omitting return to work interviews	Most people clear about what is expected from them at work and act responsibly when sick, or needing other leave: • Policies up to date and communicated. • Managers apply them quite consistently and address most problems. • People operate within code of conduct • Absence levels reasonable. • Most staff are taking regular holidays	Everyone clear about what is expected and act responsibly and • Managers apply policies consistently and address problems • All staff take regular holidays. • People clear about and operate within the code of conduct • Policies up to date and communicated. • Occupational health scheme available as needed. • Monitoring system in place and reviewed.

	AT RISK	WEAK BUT AWARE	GOOD IN PARTS	WORKING QUITE WELL	EXCELLENT
Engagement (motivation and satisfaction) *"I love it here – it's a really satisfying place to work!"* 9	*"It's a real drag getting out bed in the morning to come here."* • People feel de-motivated and/or undervalued. • High staff/vol. turnover • High levels of absence • Unclear salary structure • Poor communication and involvement. • Low satisfaction – poor performance • Volunteers may feel taken for granted and undervalued. • Culture of blame and hiding mistakes	*"We need to address morale"*: • The causes may still need to be identified. i.e. more than pay • Little communication about basis of pay structures, reward, promotions etc • Some awareness that there are issues with organisational culture	*"People seem pretty happy here"*. We have some awareness of what staff/ volunteers are feeling generally e.g. via a one-off survey: • Communication about management styles and culture • Policies in place for pay and internal promotions, grievance procedure, though not always understood	Most people generally happy and VCO has good information about how people feel about different aspects of work. • Pay, promotion and grievance policies are articulated and understood. • Absence levels are reasonable and understood • Learning from mistakes is encouraged	*"We love it here!"* People enthusiastic and engaged in their work and the VCO: • Staff see salary/ benefits as transparent • Low/ appropriate staff, volunteer turnover. • High staff and volunteer satisfaction, surveyed and reported on regularly • People are consulted on key organisational issues, where appropriate. • Strong culture of exploration, appropriate risk-taking and learning
Teamwork Working together for our common purpose we achieve more. 10	Staff/volunteers lack understanding of how their role fits into the organisation's aims. • Working in a 'silo' and not communicating across the organisation • Individuals in the same building – little coherence or communication	Some people talk to each other, weak overall sense of purpose, though we recognise the need to work together. • Differences cause tensions and maybe unresolved.	We are quite good at talking to each other: • Some teams within the organisation have good internal communication, less good between teams. • Limited openness and trust leads to fear of differences • CEO actively addressing patchy communication	We have a clear sense of common objectives, and trust each other. • High participation in communication structures. • Clear steer from leadership that time invested in communication is worth it • May be some competition, lack of trust or unwillingness to work together.	We all understand the mission, vision and values of the VCO and they are central to the way we work. • People and teams work together openly and flexibly with shared objectives that fit into the overall mission • CEO invests time maintaining high standards

SCORE RECORDING SHEET

		Retrospective reading	Our score today	Our score today (second time)
Date:				
1	Vision and leadership			
2	Management			
3	Roles and Responsibilities			
4	Working together			
5	Recruitment			
6	Workforce Skills			
7	Motivation and satisfaction			
8	Dealing with conflict			
9	Safety and well being			
10	Clarity of expectations			

WORKFORCE ACTION PLAN

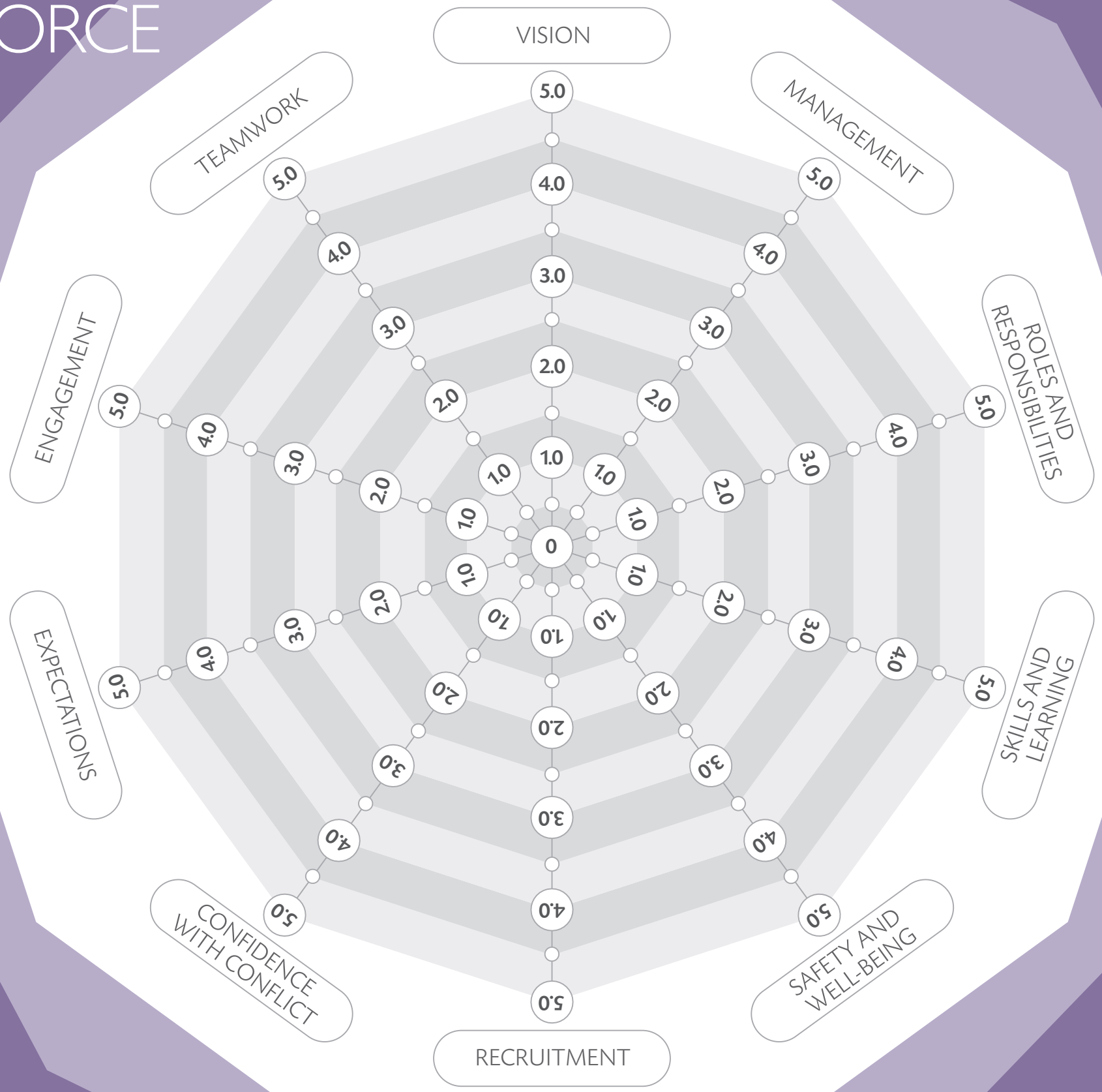
Group name: Date:

Priority outcome area to work on in this plan	Current score	Desired score	Actions needed	Person responsible	Date for completion

Signed (for group) Facilitator/advisor

Date of next review meeting:

WORKFORCE WHEEL



This publication can be made available in large print and alternative formats on request.

Please contact NCVO on 020 7713 6161 for more information.

FUNDED

National Council for Voluntary Organisations
Regent's Wharf
8 All Saints Street
London N1 9RL

T: 020 7713 6161
F: 020 7713 6300
E: ncvo@ncvo-vol.org.uk
www.ncvo-vol.org.uk

Textphone: 0800 01 88 111

Free advice and support
www.askNCVO.org.uk
HelpDesk: 0800 2 798 798
or helpdesk@askncvo.org.uk

Charity Registration: 225922

The paper used for this publication is sourced from sustainable forests.

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