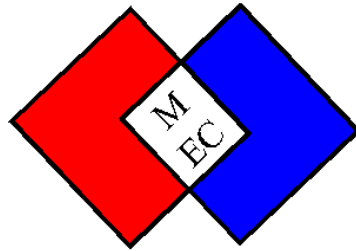


MEC SERVICES LTD & INTRACITE LTD



**Organisational Improvement -
Excellence Assessment
With A Difference**





What is an Organisational Appraisal	1
When to Use the Organisational Appraisal	1
How Does It Work And What Does It Cost?	1
Why Use MEC Services Ltd.....	3
Why Undertake A Process Of Organisational Improvement?.....	4
EFQM Excellence Model	4
Introduction to the MECimprove Process	4
Appraising.....	5
Planning	6
Planning Workshops	6
Initiative Planning.....	7
Enhancing	7
Programme Management	7
Project Management	7
Assistance with Initiatives	7
Re-Appraising.....	8
Introduction to the EFQM Model.....	9
Concepts of Excellence.....	9
The Model.....	9
Self-Assessment.....	10
The RADAR® Approach.....	10
Awards.....	10
Acknowledgements.....	10

Intracite Appendices

The QSMART-EX Excellence Measurement Service
Excellence Assessment With A Difference

Sample Reports



What is an Organisational Appraisal

The MEC Services Ltd Organisational Appraisal is a stand-alone assessment that allows you to find out how your current business stands using Europe's foremost business model, the EFQM Excellence Model (©EFQM 1999). It allows you, in one quick and easy step, to determine:

- How effective are your leaders and what is their contribution?
- How well do you determine your strategies - and implement them?
- Are you systematic in getting the best out of your people?
- How well do you look after all your assets, not just the cash flow?
- Are your processes truly customer friendly?
- Do you monitor the views of your stakeholders, and what are they telling you?
- Are your results as good as they should be?

When to Use the Organisational Appraisal

The Organisational Appraisal can be used at any time to obtain a snapshot view of the state of the organisation. The occasions when this might be useful include:

- When the organisation seems to be going through a bad spell relative to its competitors and need to identify areas where things are not going right
- To assess the state of a poorly performing department or subsidiary
- To assess the state of a high performance department or subsidiary to identify what they are doing well and identify best practices that could be shared with the rest of the organisation
- As a basis for an on-going performance improvement initiative
- To provide a standard tool for obtaining some information that can be used for internal benchmarking or against other organisations, competitors, or partners

How Does It Work And What Does It Cost?

We have teamed up with Intracite Ltd to offer you two levels of assessment, both at a fixed price:

1. The Standard Assessment. (British Quality Foundation Recommended)

We will organise with Intracite Ltd for you to use their standard Internet based assessment that allows you to set up a Respondent Community, conduct the assessment survey, and receive a report of the findings.

Respondents	Price
Up to 50	£ 1,000
51 to 100	£ 1,500
101 to 200	£ 2,000
201 to 500	£ 3,000
500+	Price on Request



Intracite Ltd also offers a range of additional services including a total data set in electronic format with an analysis module to enable you to conduct your own ‘on the fly’ analysis. (Price on Request)

2. The MEC Services Ltd Facilitated Assessment

We are able to offer assessments in a variety of different formats ranging from a simple workbook approach, for the smaller organisation, to the Internet. (The Internet option is especially useful if you wish to include staff that are geographically spread.)

a) We will hold an introductory meeting lasting about 2 hours with the Sponsor and, if desired, the senior management team to discuss:

- The background to the assessment
- The assessment survey process
- The respondent community
- How the assessment is to be explained to the respondents
- The feedback and reporting options

b) We will operate facilitated workshops at your premises, each of approximately 2 hours for up to 25 people at a time, to explain:

- The background to the assessment
- An explanation of the wording and terminology used in the survey
- Assistance in undertaking the assessment itself

Where you have staff at remote locations that will be completing the survey over the Internet we would take a ‘train the trainer’ approach. We would hold a workshop at your premises for representatives of remotely located staff who would then be expected to pass on the information. However, if you wished us to do the training at the remote location this would be subject to negotiation as it is not included in our fixed price offer.

c) We will summarise the qualitative parts of the assessment and present you with a report of the results in a meeting lasting approximately 2 hours.

Respondents	Price
Up to 50	£2,500
51 to 100	£5,000
101 to 200	£9,000
201 to 500	£15,000
500+	Price on Request

We are also able to offer a full tailoring service e.g. so that the assessment uses your own logos and terminology, as well as variety of other options for presenting the results. (Prices by negotiation depending on the work required.)



Why Use MEC Services Ltd

The advantages that we bring to the process include:

- Our knowledge and experience of organisations, and the EFQM model, that allow us to create a tailored offering to meet your organisation's presentation standards and terminology.
- The facilitation of workshops to ensure consistency of understanding and use of the appraisal
- The option of a standard report or one that includes summaries of the qualitative aspects of the assessment and suggestions as to areas that need consideration
- Our 20 years of experience in the travel and leisure industries

The Organisational Appraisal can be entirely stand-alone or can form part of MECimprove (our Organisational Improvement Process) where we use the initial assessment as a baseline for a full improvement programme. The process includes providing facilitation in workshops to identify improvement projects linked to your strategic goals and helping you in their implementation, including if required, developing your people through a full training and consulting programme in conjunction with KatAlyst Ltd another of our strategic partners.



Why Undertake A Process Of Organisational Improvement?

It may be a cliché, but it is none-the-less true, ‘the rate of change facing organisations is constantly increasing’. Organisations no longer have the option of standing still; society has increasingly higher demands whether as paying customers or as beneficiaries of charitable, governmental, or other not-for-profit organisations. This rate of change is not a transient phenomenon that will slow down soon; technology and expectations will continue to rise for the foreseeable future. The pressure of changes in society means that organisations themselves must continually adapt and improve their products and services so that they can meet the expectations of customers and other stakeholders.

In order to address the wide raft of competing pressures, as time does not permit each issue to be addressed when they occur, organisations need to have an improvement framework that enables them to constantly change in line with current and anticipated future demands. The framework must address all areas of the organisation and because of cost pressures needs to be structured enough to be certifiable but yet flexible enough to be useful.

The advantages of a widely accepted and structured improvement framework include:

- A fact based approach to assessing and measuring the state of an organisation
- The creation of a common language and understandable approach to improvement
- The ability to undertake comparisons with other organisations
- The integration of individual initiatives under a common heading

EFQM Excellence Model

One framework for continuous improvement is the revised EFQM Excellence Model¹ (© EFQM, 1999.) Originally created over ten years ago by the European Foundation for Quality Management, it is promoted in the UK by the British Quality Foundation (BQF) and the regional Excellence organisations.

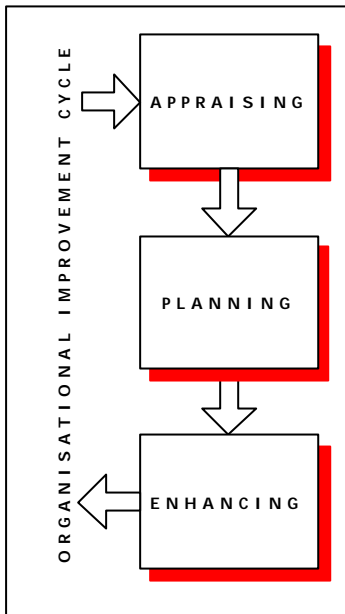
This framework is now used by thousands of organisations of all types and sizes across mainland Europe and the UK, including many recognised as being leaders in their field, and shares some common roots with the Deming Prize in Japan and the Malcolm Baldrige Award in the USA. Organisations are able to use this model as a self-assessment tool and, if they feel that they represent a beacon of best practice, can apply for an internationally recognised regional, national, or European award.

Introduction to the MECimprove Process

This document describes the standard MEC Services Ltd Organisational Improvement Process that is based on the Model. It represents a stage up from pure self-assessment for those organisation that wish to have some help to improve themselves but who do not wish to devolve responsibility entirely to an external party.

The process is applicable to all types of organisations, and consists of three fundamental stages:

¹ Previously known as The Business Excellence Model



- 1) Appraising – an assessment of the current state of the organisation
- 2) Planning – a review of the future state of the organisation
- 3) Enhancing – moving the organisation from its current state to its desired future state

Each stage is controlled by the organisation with assistance from MEC Services Ltd. In the first two stages this assistance takes the form of facilitation (not consultancy) to help the organisation to form its own views. In stage three this assistance can be anywhere in a range from facilitation of the internally defined change ideas, to full consultancy and training.

In the initial operation of the process there is a fourth stage where we provide a further survey for the organisation to re-appraise its new state. This then establishes a starting point

for a continuously repeating succession of further improvements, which we refer to as the Organisational Improvement Cycle.

The level of MEC Services Ltd's involvement in the standard process can be adjusted, through negotiation, to meet the desires of specific organisations including a full consultancy service if required.

Appraising

The Organisational Appraisal is an assessment based on a range of criteria contained in the EFQM Excellence Model. (In order for an organisation to assess whether they have improved, it is necessary to establish a starting point.) This Appraisal is used as a basis for the organisation to assess its status against these principles of best practice as laid down in the Model. The initial cycle therefore starts with this baseline appraisal and 'ends' with another appraisal that in turn becomes the starting point for the next cycle.

The Appraisal is not:

- Praise, or criticism, of the history of the organisation
- A consultant's opinion of the organisation

But

- A picture of the organisation at a point in time
- An assessment of the state of the organisation, by the organisation

The MECimprove Process is concerned with assisting organisations to improve themselves irrespective of their starting position. The organisation therefore needs to decide how they wish to apply the assessment including:

- The degree to which each criterion is applicable across individual sections of the organisation
- The levels, within the organisational staffing hierarchy, that are involved in the process.



The senior management team alone can take the appraisal, or the process can involve everybody within the organisation; it can even be used at a departmental level.

The appraisal takes the form of a survey within each of the criterion of the model with the person completing the survey identifying the degree to which they agree or disagree with the various statements. Their views are also sought to determine what they feel are the organisation's 'Strengths' and 'Areas for Improvement' (AFP) under each heading.

In the standard format of the appraisal MEC Services Ltd does not make any value judgements in respect of any of the responses nor any recommendations as to actions that need to be taken.

The degree of MEC Services Ltd's involvement can be increased to include our assessment of the results if required. This can be based achieved through a facilitated workshop where the results of the appraisal are discussed and a detailed explanatory report is produced.)

Appraising the Small Organisation

Where there are less than 20 people involved in the appraisal, the survey is contained in a workbook that is completed anonymously and will be summarised by MEC Services Ltd for presentation to the organisation as represented by either the Chief Executive, or the Management Team, or to everybody who has participated.

All those that are to complete the workbook attend a brief 1 to 2 hour workshop to explain the reasons why they are participating in the appraisal and how they should complete the survey.

(If preferred the organisation can use the electronic versions of the workbook)

Appraising the Medium and Large Organisation

For organisation of more than 20 people the workbook is also available in an electronic version that can be installed on a PC, your Intranet, or made available over the Internet, or through email.

Planning

The appraisal, although it can be an end in itself, provides a basis for planning how the organisation can take advantage of their Strengths and address the AFP. The MECimprove Process recognises two stages to planning – the Planning Workshops and Initiative Planning.

Planning Workshops

The planning process starts with a comparison of both the Strengths and AFP against the organisations existing strategic goals and objectives to identify possible new strategies and / or prioritise those areas where action is needed. This involves MEC Services Ltd facilitating one or more workshops with the representatives of the organisation and summarising these in a report.



As in the appraisal process MEC Services Ltd does not make any value judgements in respect of the areas for action, or their relative priority, as defined in the workshop(s), unless required by the organisation.

Initiative Planning

In this stage the organisations decides upon which areas for action are to be addressed through establishing one or more prioritised Initiatives. Those involved in each initiative will discuss in workshops, facilitated by MEC Services Ltd and summarised in a report, to answer:

- What are the objectives of the initiative?
- How will these objectives be achieved?
- Who is responsible for achieving the objectives?
- When will the objectives need to be achieved?
- Which resources (money, people, technology) are required for the initiative?

Again MEC Services Ltd does not make any value judgements in respect of any of the elements in the initiatives, unless requested to do so.

Enhancing

The organisation has created, in the planning stage, a list of prioritised initiatives together with outline action plans for each initiative. MEC Services Ltd will assist the organisation to complete the initiatives that are approved where requested. This assistance can be at various levels within each initiative, or for the overall programme of initiatives. Examples of the assistance that could be offered include:

Programme Management

- Establishing a 'Programme Office' to be operated by the organisation, including identifying, selecting, and training the necessary staff.
- Defining and documenting the processes that will be used by the programme office

Project Management

- Establishing a project team for each initiative including identifying, selecting, and training the necessary staff.
- Defining and documenting the processes for operating the project.
- Mapping and benchmarking processes to identify best practice
- Creating a detailed business plan for the project including establishing the scope, resources required, and obtaining approvals

Assistance with Initiatives

- Providing intellectual resource and time assistance for tasks within each initiative
- Providing training for the new skills required by the initiative.
- Managing the change process for the initiative



Re-Appraising

This is a repeat of the initial Appraising step. If requested by the organisation, any further report prepared by MEC Services Ltd will, on this occasion and in future cycles, include a section showing progress from the previous appraisal.



Introduction to the EFQM Model

The European Foundation for Quality Management (EFQM ®) was created in 1988 by several of Europe's leading organisations to promote Excellence in Europe through the application of the Excellence Model.

Previously known as the Business Excellence Model, it is an approach that allows organisations, irrespective of sector or size, to measure themselves against principles of good practice. It is the equivalent of similar initiatives such as the Deming Prize in Japan or the Malcolm Baldrige Award in the USA and is represented in the UK through the British Quality Foundation and the Regional Excellence bodies.

Concepts of Excellence

The Model contains a non-prescriptive approach to some Fundamental Concepts that underpin the model:

- Results Orientation –balancing and satisfying the needs of all relevant stakeholders
- Customer Focus – focusing on the needs of current and potential customers
- Leadership & Constancy of Purpose – creating an environment where all people can excel
- Management by Processes & Facts – understanding of, and systematic approach to, inter-related activities
- People Development & Involvement – encouraging involvement through shared values and a culture of trust and empowerment
- Continuous Learning, innovation & Improvement – managing and sharing of knowledge
- Partnership Development – establishing mutually beneficial relationships based on trust
- Public Responsibility – adopting an ethical approach to the community at large

The Model

The Model consists of an assessment against nine criteria, each with a number of sub-criteria, split between five 'enablers' and four 'results':

Enablers:

- Leadership
- People
- Policy & Strategy
- Partnerships and Resources
- Processes

Results:

- People Results
- Customer Results
- Society Results
- Key Performance Results

It provides a structured approach to improvement by creating a common language and a shared understanding within the organisation as to its objectives, policies, and processes. It allows the organisation to identify and share best practice within itself or by benchmarking against other similar organisations.



Self-Assessment

Most organisations use the EFQM Excellence model for self-assessment. This involves using a template to gather information as to how the people in the organisation perceive that it is performing in relation to the principles described in the model.

An initial baseline assessment identifies their strengths and areas for improvement as a starting point for a continuous journey of improvement. The baseline assessment then allows the creation of a map for the future that charts a set of improvement initiatives where success can be measured through further assessments.

The model is equally applicable to successful and less-successful organisations as it creates an improvement journey irrespective of starting point. Every organisation has room for improvement; no organisation is perfect!

The RADAR® Approach

The RADAR approach is the logic behind the model and consists of four elements:

1. Results
2. Approach
3. Deployment
4. Assessment and Review

The logic is that the organisation determines the Results they're aiming for, plan the Approaches to deliver the results, Deploys the approaches, and then Assesses and Reviews the achievements.

Awards

For organisations that consider themselves as beacons of excellence, there is an opportunity to apply for one of the prestigious regional, national, or European awards. A team of assessors judge the applications and winners, which have included small primary schools to large multi-nationals, are recognised at the relevant award ceremonies.

Acknowledgements

All registered trademarks are acknowledged as being those of The European Foundation of Quality Management. Some of text used above is based on documents from the Foundation and their copyright is also acknowledged.

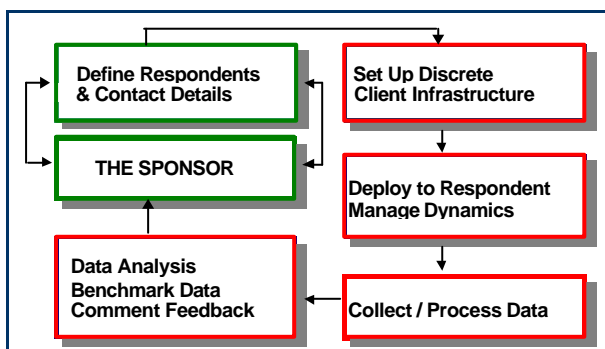


QSMART-EX is a fully Managed Internet Service Product, addressing measurement and analysis of Excellence within an organisation, based on the internationally accepted EFQM Excellence Model (©EFQM 1999). A stand-alone in-house version of the product is also available.

The results will take you straight to the issues across your organization, pinpoint areas of concern and set the priorities to be addressed. With rapid assessments you will have more time to invest in improvements, taking early positive action.

QSMART-EX is a standard cross industry measurement survey and analysis product, requiring minimal effort on the part of The Sponsoring Client (The Sponsor) to participate and gain the benefits. The Front-end survey is electronically deployed to the Respondent community on the Internet or via e-mail or diskette.

The Service Dynamics



The only Sponsor Input to the service is the definition of the Respondent Community, their contact details and setting the message to be broadcast. It is as easy as that. The QSMART-EX service will manage the full process on behalf of The Sponsor and, after the agreed cut-off date, provide the results analysis. The service includes:

- Build Sponsor details into the system.
- Deploy the survey to the community.
- Manage any e-mail address errors.
- Process and analyse the result's data.
- Provide feedback analysis reports.

Summary of Results Feedback.

- Respondent community views on each Criterion.
- A Rating against the Weighted Model.
- Your overall Responses / Rating in comparison to all QSMART-EX users.
- Respondent Criterion comments.

Further analysis is available on request.

Key Benefits to The Sponsor.

The Application provides perceptions in areas such as:

- The effectiveness of your leaders and their contribution.
- How well you determine and implement your strategies.
- Do you get the best out of your people.
- How well you look after your assets.
- If your processes are customer focused.
- If results are as good as they should be.

The Managed Service provides:

- High Respondent response.
- Minimal effort required by The Sponsor.
- Right first time and fast results.
- Rapid analysis of data.
- Corrective actions in place soonest.
- Benchmark comparison data.

To find out more about QSMART-EX.

Visit: www.q-excellence.com
Contact: 01276 401600
pring@intracite.com



The Challenge of Today's Marketplace

Benchmark performance – what it takes to achieve market leadership, superior work processes and outstanding results.

Keeping your stakeholders satisfied – the keys to operational excellence.

Meeting the Challenge

Begin at the beginning – find out how your current performance rates against Europe's foremost business model, the EFQM Excellence Model (©EFQM 1999). Assess your business, and then act upon that information. For example:

- **How effective are your leaders and what is their contribution?**
- **How well do you determine your strategies – and implement them?**
- **Are you systematic in getting the best out of your people?**
- **How well do you look after all your assets, not just the cash flow?**
- **Are your processes truly customer focused?**
- **Do you monitor the views of your stakeholders?**
- **What are they telling you?**
- **Are your results as good as they should be?**

SMART-EX based on the internationally accepted EFQM Excellence Model, a basis for business benchmarking, has received endorsement from the British Quality Foundation. (BQF)

QSMART-EX will take you straight to the issues across your organization, pinpoint areas of concern and set the priorities to be addressed. With rapid assessments you will have more time to invest in improvements, taking positive action.

QSMART-EX Excellence Assessment

QSMART-EX is the EFQM Excellence Model assessment, analysis and improvement planning system with a difference. The unique design features of **QSMART-EX** provide benefits to help improve your business performance by reducing the time taken to assess while sounding out your own people to help you decide on the pressure points.

You can begin your improvement journey sooner, and with confidence.

QSMART-EX, utilizes an electronic survey tool via Internet, e-mail or local PC deployment for front end data collection, offering the following operational benefits:

- **Proven capability**
- **Ease of use**
- **Speed and accuracy**
- **Low cost and effort**
- **High response rate**

To find out more about QSMART-EX.

Visit: www.q-excellence.com

Contact: 01276 401600