

APM Corporate



ACCREDITATION

CASE STUDY



Introduction

Pet charity Blue Cross has been dedicated to the health and happiness of pets since 1897. It opened the world's first animal hospital in 1906 and since then has never closed its doors.

As well as protecting and caring for unwanted, abandoned or sick pets, it works to educate the public in responsible ownership, promote companionship and to enhance the lives of both pets and humans.

The charity employs over 600 staff and some 2600 volunteers. Its operation spans over 50 sites, including 12 re-homing centres for dogs, cats, horses and small

animals, four veterinary hospitals and five clinics, a mobile vet service, a network of volunteer foster carers and over 40 charity shops that help generate essential funds. The charity produces a wide range of print and online educational information and an education programme for schools and colleges.

In 2013, its annual turnover was £30 million. During that year the charity carried out nearly 100,000 clinical procedures and admitted over 8,000 pets for rehoming. As well as day-to-day running costs, Blue Cross has a significant capital programme of work on major projects.

A change for the future

Delivering the very best care to so many needy pets calls for far more than the hands-on attention of the dedicated staff and volunteers. Efficient organisation, refurbishing or rebuilding sites, improving our IT infrastructure, effective communication and importantly, continual fundraising are among the essential elements that enable the charity to carry out its vital work.

Blue Cross's activity in projects covers all aspects of its services and there are a number of change programmes now in place which help deliver new organisational capacity to generate more funds and reach more pets.

The charity is relatively new to formal project management. There are only a select number of dedicated project management roles, but many other members of staff are involved in project activities as part of their business-as-usual jobs, which traditionally have carried little or no project management training.

Blue Cross has undergone a period of significant change and one of the issues that arose was the number, scale and complexity of current and planned projects and the variety of ways that they were being run.

The executive team, with the support of the trustees, identified the need to introduce a single, uniform way of managing projects across the business. This would give a more consistent way of implementing and sustaining operational improvements and ensure that the investment in project-related work was optimised in a joined-up and informed way.

"Part of my remit was to put in processes in a way that was understandable to everyone," explained Kate Gloyn, project development manager for Blue Cross. "It was important not to over-complicate things and to make sure that the supporting materials were engaging and easy to use.

"We consulted with other charities and organisations who warned us not to underestimate the time it was going to take – they recommended allowing at least two years to do it properly."

The result was PlanIt Blue, a professional and robust approach to project management processes and developing skills across the organisation according to an individual's level of involvement and the scale of the project on which they are working.

The aim was straightforward – to achieve a high level of project management professionalism by guiding and supporting people every step of the way whatever their level of project experience and knowledge. This in turn would lead to cost savings, releasing money that could then be used for other vital work.

A route plan for all

Led and sponsored by Richard Hollands, Blue Cross Director of Business Assurance, PlanIt Blue has the full backing of the executive team.

At its hub is the Project Centre of Excellence (PCE), comprising the small percentage of dedicated project



management professionals. As Prince2 Practitioners and aspiring APM Registered Project Professionals, they contribute the expertise and knowledge to oversee all projects, provide governance, reinforce best practice and support colleagues.

Developed using the *APM Body of Knowledge* supported by PRINCE2, PlanIt Blue is in line with the charity's strategic plan based around a balanced scorecard approach to learning and development.

"We recognised at the outset that while PRINCE2 provided a solid methodology it didn't provide the depth of knowledge and skills that we needed to up skill our teams to deliver successful projects and to develop the project management community to the level of professionalism desired," said Kate. "The *APM Body of Knowledge* provides this level of knowledge."

The approach also had to complement the charity's five core values – to be responsible, dynamic, compassionate, fair and reasonable and to act with integrity.

"These values are ultimately about changing culture and helping Blue Cross to become the very best it can be," said Kate. "It is crucially important to find a balance across the values rather than sacrifice one for the sake of another."

Because of the different levels of involvement of Blue Cross people in projects, training and development focuses on improving overall awareness and understanding of project management and its role in a way that is clear to everyone.

"The project management community within Blue Cross has a healthy appetite for a consistent and robust approach," explained Kate. "The branding behind PlanIt Blue aims to make this serious message more palatable, engaging and less intimidating for inexperienced project managers."



Kate Gloyn, project development manager



Individual needs are identified during annual performance reviews, together with regular meetings within and across departments to look at individual and project team performance. There are four key stages in the PlanIt Blue development process:

- Foundation level – available for all staff with any involvement in projects with a multiple choice assessment examination at the end of the session
- Project management training – for staff leading simple projects or involved with standard or complex projects. Assessment is through evidence of performance on live projects, using *APM competence framework* and PlanIt Blue standards
- Project Board – for nominated, selected key staff. Assessment as Stage Two
- Project Centre of Excellence (PCE) – for the core project management community and those with the most proximity to projects within their role. This is a journey from APMP and PRINCE2 through APM Practitioner and up to APM Registered Project Professional (RPP).

Training is delivered through a range of methods, from e-learning on the charity's learning site, Blue Horizons, experiential learning, workshops and formal courses. To enhance the learning experience, Blue Cross has developed some innovative formats in addition to traditional methods and approaches.

These include the ingenious quick-reference cardboard wheel that guides users through the basic key aspects and principles at each stage of a project lifecycle and a short animation video that 'storyboards' a typical Blue Cross project in a highly engaging way.

Kate explains: "We quickly decided that our project management approach needed to have its own identity in order to help it fit in/appeal to the audience. We looked at how this identity could help endear the project management approach to our people, we opted for a simple, approachable and user friendly style with a variety of fun tools to support it."

Members of staff are encouraged to maintain and improve their competence through continuing professional development (CPD). A virtual project community on the Blue Cross intranet is a portal to the wider project management world, hosting copies of the *APM Body of Knowledge*, case studies, articles, webinars and links to other CPD opportunities and events.

Blue Cross is also a member of a third sector project management forum where it can share and compare experiences within not-for-profit organisations.

The importance attached to improving project performance and skills is underlined by the direction taken by the Blue Cross Talent and Development team. The group is now looking at ways to include PlanIt Blue and project management into the core foundation skills of all managers at the charity. This recognises the importance of project management as part of any modern manager's skills set. This approach seeks to integrate project management fully into the functional management of the charity.

For Blue Cross, accreditation is not about a badge on our letter heads or a piece of paper that says we've met a standard. It is a validation that we have good systems and approaches in place to deliver better projects and better outcomes for the people that use our services and generously support us with their time and money."

Richard Hollands,

Blue Cross Director of Business Assurance

Personal story

Andrew Roberts is a Blue Cross IT Systems Administrator, with no project management experience. He explains he was one of the first to take part in PlanIt Blue: "Each phase of PlanIt Blue enables me to plan effectively, to ensure a consistent approach throughout and deliver on time. One of the key areas of PlanIt Blue for me is the issue change documentation, allowing me to keep track of outstanding problems and prioritise anything that needs attention which may delay the project. This also serves as a useful record for the future to look back on what problems occurred, who made decisions and how issues were resolved. Communication is also a key element in any project, and PlanIt Blue allows me to develop an effective communications plan to ensure everyone is kept up to date throughout the project."





Association for Project Management and Blue Cross

Blue Cross is a corporate member of APM and is the first charity to gain accreditation for its training and development programme.

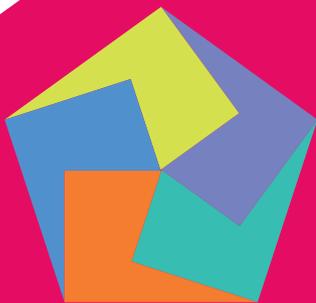
The *APM Body of Knowledge and Competence Framework* have been used as the main references for developing PlanIt Blue, to map an individual employee's level of skills and to identify training needs.

Opportunities are provided to achieve appropriate APM qualifications. All members of the PCE are encouraged to become individual members of APM, progressing from Associate to full membership as they reach the required levels of skills and knowledge. Membership is funded by the charity. As ambassadors for PlanIt Blue, members of the PCE are expected to abide by the APM Code of Professional conduct and to demonstrate this level of professionalism internally and to external stakeholders and colleagues.

Association for Project Management

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FIVEDimensions of Professionalism

APM Corporate Accreditation

APM Corporate Accreditation will help you stand out as an exemplar in the development of project management professionals. It provides assurances to your customers and suppliers and allows you to attract and retain the best project management talent in the country.

APM Corporate Accreditation recognises the commitment of organisations and professional development services to the defined APM Five Dimensions of Professionalism, each of which is supported by an APM standard:

Breadth

The APM Body of Knowledge defines the knowledge needed to manage any kind of project. It underpins many project management standards and methods including the National Occupational Standard in Project Management.

Depth

The APM Competence Framework provides a guide to project management competences. It is part of your professional toolkit; mapping levels of knowledge and experience to help you progress your skills and abilities.

Achievement

APM qualifications take your career in new and exciting directions. They are recognised across the profession and aligned with IPMA's 4 level Certification Program.

Commitment

Continuing Professional Development helps develop your project management practice. A targeted development plan will enhance your project management career.

Accountability

The APM Code of Professional Conduct outlines the ethical practice expected of a professional. Becoming an APM member shows your commitment to the Code and sets you apart from others.