CHAIR’S MESSAGE

As the Chair of Council, it is with great pleasure that I provide this introduction to the 2018 – 2019 Annual Report. In last year’s introduction I mentioned that 2017-2018 would be remembered as a period of uncertainty in which the full impact of Brexit would be determined.

This has clearly not been the case as uncertainty regarding Brexit has continued over the past year. As part of our strategic response to the ongoing and unfolding challenges of Brexit, the Institute has established a new not-for-profit company in Germany in 2019 which, going forward, will be instrumental in maintaining existing relationships with European partners and strengthen our European presence in years to come.

During the past year, the Institute has also progressed a number of other initiatives, including the instigation of a digital archiving project. This will be an extensive programme of work which further builds upon the earlier establishment of a paper archive at the Wellcome Library in 2014.

The clear focus of the Institute on social science issues and challenges remains as strong as ever. And, the professional development provision, and the portfolio of funded projects, have remained strong throughout 2018-2019.

The TIHR continues to be a relevant and important organisation and, as with previous years, it is anticipated that we will continue to make progress in 2019-2020 while nurturing and protecting our core values and the TIHR legacy.

Professor Cliff Oswick PhD MSc BSc (Hons)
Chair, Board of Trustees
ACHIEVEMENTS, PERFORMANCE AND IMPACT

HIGHLIGHTS

During 2018-19 the Institute completed the registration of a new not-for-profit entity in Cologne, Germany called Tavistock Institut gGmbH (TIG). This new company has been created to retain our strong and focused connections with Europe and to mitigate the UK’s decision to leave Europe through Brexit. TIG is anticipated to continue working with European Union institutions such as the European Commission and the European Parliament.

ARCHIVE AND THE ENVIRONMENT

BORN DIGITAL – kick-starts the next phase of our archive strategy: Having established the paper archive at the Wellcome Library, Born Digital addresses our digital records (up to 2010). Faced with nearly 1 trillion bytes of data, we hope to make the Institute’s more recent heritage available and that this process will feed into streamlining our current information management processes and eventually become a cornerstone of our developing environmental commitments.

The Environment Group was initiated within the Institute over the last year and is working towards making a business case to improve the Institute’s environmental performance whilst exploring domains of possible change and actions needed.

REIMAGINING HUMAN RELATIONS

The 70th anniversary Festival lives on! In opening up the Institute’s archive through the 70th Festival, we recognised that working with our historical heritage was potential for the Institute to re-identify, re-establish, and re-root itself as an organisation active and innovative in working with contemporary challenges.

Learnings from the Festival were confirmation that the Institute sits at the centre of a global community of practice, leading and innovating through social science.
ART, DESIGN AND ORGANISATION

This year saw a number of new initiatives further establishing the Institute’s reputation and leadership in this area, including:

- Lunchtime Talk poetry reading by Dr Joe Cullen, which raised questions of how we imaginatively empathise with the people who are the subjects of our research;
- Entelechy Arts with *Echoes at Home* - an installation of drawings with poetry and quotes from residents at the Tower Bridge Care Home;
- Completion and publication of research for Arts Council England on the nature of relationships between organisations;
- A PD workshop *Art at Work* at the 79th Academy of Management’s Annual Conference in Boston;
- Continued support of Robert Clark’s practice and development of the MASS dance project.
- The launch of the *Deepening Creative Practice in organisations* programme, weaving together the arts / social science weave together

*Illuminating both the archive and current preoccupations:* a further series of Social Dreaming matrices plus a remarkable interactive performance with East15 Acting School – *The Liver in Bed Two*, at the Wellcome Library. Through participatory theatre, some of the Tavistock’s key theoretical concepts (eg experiential learning) were communicated, bringing to life Isabel Menzies Lyth’s research into the work of nurses in the 1950s and highlighting the mirroring between then and now.

DESIGNSCAPES

A project exploring how design can help produce new solutions for *wicked* problems in our cities. Funded by the European Commission’s Horizon 2020 programme, it promotes the use of design-enabled innovation in cities by encouraging upscaling design-enabled innovations by enterprises, practitioners, entrepreneurs and start-up companies, public authorities and agencies as well as urban stakeholders.

LEADERSHIP & CULTURE CHANGE

HERTFORDSHIRE ADULT SOCIAL CARE SERVICES

January 2019 saw the implementation of Herts’ *Connected Lives* strategy. They wanted to move towards a culture where practitioners were empowered to take up their own professional authority when working with colleagues, clients and their families. And to enable them to work across boundaries, develop partnerships and work creatively to support people living in the community.
What’s the difference? It is early days, however people are already reporting that they and others are going about their daily practice, or ‘being’ in a different way, and a number of initiatives have begun or practices are changing.

DIVERSITY & INCLUSION

WELLCOME Diversity & Inclusion Project
There is a misconception that the main focus of D&I work is just about race, rather than what all individual differences mean in a particular organisational context. These can be relating to sexuality, gender, ability or disability, age, race or any combination thereof: often described as intersectionality.

BUILDING LEADERSHIP FOR INCLUSION - BLFI
The NHS Leadership Academy has launched a new and ambitious programme of work that will inform a future ten-year strategy aimed at health and care staff, exploring how to build diverse and effective leadership across the NHS. This project uses a creative blend of organisational consultancy and leadership development to create something new.

EVALUATION

INSIDE OUT
Inside Out is a partnership between three local authorities and The Children’s Society, aimed at developing a coaching model to assist young people aged 15 or above in local authority care who have already experienced multiple unsuccessful placements. The project aims to stabilise their placement and help them to make positive choices and improve decision-making.

The evaluation of the pilot by the Institute combines a qualitative and quantitative methodology to assess the benefits of the intervention and any lessons which may be learned in rolling out the programme on a wider scale.

BRITISH COUNCIL – evaluation capacity building
Working with IpsosMORI for the British Council, to support them as they meet the growing demand for evidence of the value of their work. We have travelled to five regions (South & East Asia, Middle East & North Africa (MENA); Sub-Saharan Africa plus the UK) delivering nine training courses, to nearly 250 participants from over 20 countries.

Relevance and Impact: We asked participants, Regional Evaluation Advisors and facilitators to provide systematic feedback: they described the importance of having a Theory of Change in place as well as embedding evaluation in the programme design; of programme intensity, scale and scope; and of identifying, if possible, causal linkages within the programme. Providing a ‘safe space’ with a positive, constructive atmosphere; and a collaborative mix of participants were valued by many.
THE MEDICI PROJECT

is a two-year EU-funded project which aims to map digital inclusion best practices across the EU and beyond. The Tavistock Institute are project partners in a consortium of six organisations, coordinated by Universidad Internacional de la Rioja (UNIR).

Digital exclusion involves getting more people online, improving the digital skills and confidence of citizens from socially excluded communities and re-designing services to take the digitally excluded into account.

The main activity of the Medici project is to find, research and catalogue best practices in reducing digital exclusion.

SOCIAL CAUSES

Supporting the learning of THE ORGANISATIONAL EXPLORATORY PROGRAMME - OEP

In collaboration with The Wellbeing Project, the Center for Healthy Minds, the University of Wisconsin and eight partnering social change organisations across the world, we are supporting these ‘change-makers’ to experiment with and address challenges to workplace wellbeing.

The motivations and drive of individuals campaigning for social justice is often such that their wellbeing suffers: rates of burnout, depression and divorce are high in this sector. We bring our expertise in organisational change and group relations/psychodynamics to facilitate a space for learning and reflection.

PROFESSIONAL DEVELOPMENT

Another successful year for Professional Development. We had record numbers on several of our certificated programmes. New programmes have been launched whilst others have matured to establish themselves as core elements of our offer.

We have continued to work around creating developmental pathways through our programmes, offering something for everyone from novice to expert.

- Coaching for Leadership: Psychodynamic Approaches – ran for another successful year in a highly competitive marketplace. We have undertaken a relaunch under a new name for the next cohort and so far we have record recruitment and already have a waiting list for next year’s programme
- Supervision for Coaching & Consultancy - another successful year for this advanced programme for experienced coaches and consultants
P3C - Practitioner Certificate in Consulting and Change - we had record numbers on this year’s programme. Once more attracting an international multi-sector group to this highly applied, experiential programme

- Dynamics @ Board Level - another record year for this programme which continues to attract high calibre international senior participation. This year also heralds the publication of a book written by participants and edited by the Directors

Organisational Consultancy – working with the dynamics - this year saw the launch of this new programme. In offering a reflective space for advanced practitioners to deepen their practice and develop a supportive peer network, this programme fills a much needed gap

- Deepening Creative Practice with organisations – planning has been underway for the launch of this exciting new offer in 2020. We believe this is unique in the market in exploring the possibilities of integrating OD, change and creative practice.

We run stand-alone modules for other organisations introducing theories and methodologies from our core programmes, including at King’s College London

Practical Seminar Series for Organisational Change – Four of these ran successfully in 2018-19. They attracted relatively small groups who reported powerful learning. We want to rethink the offer for 2020 to see how we can make the offer available to a wider audience.

Executive Coaching and Supervision
Workplaces are increasingly becoming more challenging and our coaching offer has remained in demand, particularly for leaders, senior executives and those poised to move into or already finding themselves in a more accountable position.

Equally, we are sought-after by coaches and consultants who want a supervisor who can help them delve under the surface of what is really happening for their clients and simultaneously work with the wider context, offering a 3-D experience.

GROUP RELATIONS PROGRAMME

The Global Community
The Institute plays a key role in the development and expansion of Group Relations (GR) as a learning methodology and a consultancy / research practice. It acts as a champion, advocate and co-sponsor of international GR conferences that study the nature of authority and those that apply Group Relations to current and future organisational and community challenges.

We had staff take part in conferences in Israel, China, India, South Africa, USA, Russia, Lithuania and Australia to name a few. As well as other conferences and programmes, we also co-sponsored the PCCA conference studying the legacy of historic conflict on all continents.
Task Authority Organisation – Love@Work

The 2019 conference in August was attended by 68 members and 13 staff. Together the 81 members of the temporary learning organisation wrestled with the complex feelings aroused in followers by the presence of leaders, and how the leaders are at the mercy of followers to find, make and take their roles. This was the most diverse of the 73 Leicester Conferences so far, with over 29 nationalities and even more languages spoken.

Many attendees had become interested in Group Relations through courses at Harvard Kennedy and Business School programmes, as well as INSEAD and IMD – all of whom offer opportunities to study Tavistock Institute approaches. They then take the “Pilgrimage to the Mothership” as one participant described it.

The Leicester Conference continues to provide a two-way pathway. Firstly, into a way of thinking and being in the world. Secondly, members go on to join our other programmes, and vice versa, once people have attended one of our programmes, they often want to further explore the intensity and depth of the Leicester Conference.

The issues that come alive in the conference have parallels in wider society. It could be said that our social matrix is condensed and amplified within the conference itself, and the appeal to global and local leaders to come and study what leading and following, as a collaborative dance, can mean in day to day reality.

Launching Young Leaders is a central component to the thinking about our Group Relations offer and the importance of developing the new leaders and managers of tomorrow. As well as providing a development space for people right at the start of their careers it has generated much international interest and requests for bespoke programmes.

Better Together

Emerging out of the Belgirate meeting of 2018 (see below), a gathering of Presidents, Chairs and leaders of Group Relations’ sponsoring organisations met online several times throughout 2019. The Group generated a number of sub-groups that are exploring the possibility of sharing information, developing joint projects and generating a shared commitment to the growth and expansion of Group Relations activity. 2019 was a year of global innovation, seeking out new ways of being as Global Leadership colleagues.
Belgirate
The 6th scientific meeting of Group Relations staff practitioners from around the world called: The Place where we Live: the space for Group Relations took place from 1-4 November 2018 in Italy with 96 participants – it’s a valued intellectual and networking hub. TIHR is a managing partner of these meetings (co-sponsored with OFEK, Israel and AKRI, America) and now also undertakes the administration including finance. A book will be published by Routledge, based on the papers presented at the meeting.

THE TAVISTOCK COMMUNITY

held its first Annual Gathering in June. This is a community network for Tavistock thinking, a forum to exchange ideas, develop practice and promote our approach. It is for our programme and conference alumni and Friends of the Tavistock (those who have worked or are working with us) who want to stay connected and build working partnerships using our methodologies.

TAVISTOCK INSTITUTE CHINA (TIC)

We held the second Group Relations Conference offered by TIC and the TIHR in Qingdao in January 2019 called Creating Learning Organisations: Bringing Meaning and Engagement to Work.

From the Group Relations brochure: China is a complex world with many changes, uncertainties and hidden treasures of ancient wisdom awaiting awakening. The encounter of the western born technology of the Tavistock Institute of Human Relations with the eastern philosophies and cultures is both exciting and challenging.

This conference heralded the end for that cohort of the Group Dynamician programme offered by TIC which began in 2018. We have now launched a second cohort.

FOOD FOR THOUGHT:
LUNCHTIME TALKS

The past year has seen an invigorating and intriguing series of Lunchtime Talks, held on the third Wednesday of each month. We welcomed a diverse range of external / internal speakers who all brought something unique. Each talk is recorded and available afterwards for download.
OUR JOURNAL: HUMAN RELATIONS

Human Relations is a highly ranked international peer-reviewed journal. Human Relations articles have significant impact on academic debates on a wide variety of topics that affect people at work.

Submissions continue to be geographically diverse with 2018/19 seeing an increase in submissions from the Far East and South East Asia. 850+ submissions are expected by the end of 2019, a figure that increases year on year. In spring, the journal’s Editorial Team expanded to include four new full time Associate Editors, including academics from across the globe, and has allowed the average decision-time after peer review to reduce to just 10 weeks.

The journal also has an active social media presence and, as a testament to its high standing academically, nearly 700,000 full-text articles were downloaded in 2018.

AoM: In August, the Human Relations team travelled to Boston for the annual meeting of the Academy of Management, a preeminent multi-disciplinary conference for management and organisation scholars. At the Human Relations reception, the Reviewer of the Year Award was given to Dr Patrick Bruning from University of New Brunswick at Fredericton (Canada) and the Paper of the Year Award given to Grete Håkonsen Coldevin et al.

Ranking: Human Relations continues to be highly respected internationally and is included in the FT50 list of journals used by the Financial Times in compiling the FT Research rank, included in Global MBA, EMBA and Online MBA rankings.

Human Relations has a solid Thomson Reuters Journal Citation Reports (ISI) ranking – in 2018, the 2-year and 5-year impact factors are 3.367 and 4.360 respectively (ranked: 3/104 in Social Sciences, Interdisciplinary and 54/217 in Management).


Human Relations has a new website.
STAFF PUBLICATIONS

Books

Chapters in books


Monographs


Papers


STAFF PRESENTATIONS

University of South Africa (UNISA) - Masterclass led by Mannie Sher included a lecture on *Why are we so afraid of Love when it comes to Leadership?*

Sioo (inter-university centre in The Netherlands) - Eliat Aram began by delivering a keynote speech to celebrate their birthday and returned in June to give a workshop on *Love, Leadership and Aesthetics*.

Board Dynamics Summit run by the ICSA – The Chartered Governance Institute – Mannie Sher chaired a panel about *What makes boards creative?*

HEC Paris, international business school: part of their Global Organizations Executive Program - Coreene Archer led a day workshop on coaching

OPUS Eric Miller Memorial Lecture 2019 - Mannie Sher delivered this on the *Concept of introjective identification in organisational consultancy work*.

Royal College of Psychiatrists – Eliat Aram spoke about *Understanding Group Process: the art of the possible*.

Cambridge School of Criminal Justice MA programme – Eliat Aram spoke on *Leading in Complex Systems*.

UKES annual conference - David Drabble gave a talk about *The role of data visualisation in evaluation*.

Finnish Think Tank - Dynamics of Groups and Societies – Mannie Sher led a workshop to reflect on the *State of health of Finland*.

ICSA Annual Conference: we hosted a stall at both events to talk to attendees about the Institute and the Dynamics @ Board Level programme.

Institute of Policy Research symposium, University of Bath – Giorgia Iacopini spoke about *Professional evaluation as political deliberation: what response to the ‘argumentative turn’ away from evidence-based policy?*

Barbados Stock Exchange – Tazi Lorraine Smith, gave a speech on *Dynamics at Board level* at the 7th Annual Corporate Governance & Accountability Conference.

AWARDS

Scoping Grant: In April 2019 the Institute won a prestigious Scoping Grant from the National Archive, for Frank Owen to scope and develop a tool for appraisal of the Born Digital material. This has also enabled us to hire two archive students from UCL to sort and catalogue the material during stage 2 this summer.

We were awarded the Best Organisational Change Consultancy 2019 from the Greater London Enterprise Awards from SME News - the SME News team identify market leaders, innovators and enterprising start-ups in the greater London area.
REFERENCE AND ADMINISTRATIVE INFORMATION

Council of Trustees
Professor Cliff Oswick (Chair)
Dr Eliat Aram (ex officio)
Bill Cooke (resigned September 2019)
Joel Featherman
Dr Ruth Hannah (joined March 2019)
Joanna Hill (resigned July 2019)
Alice Long (acting Chair May 2019 to end Sept 2019)
Julia Lucas (joined September 2019)
Julie Newlan MBE, MBA (resigned July 2019)
Stella Okeahialam MBE (joined March 2019)
Prof Christopher Warhurst (Chair of HRMC on behalf of Council of Management)

CEO
Dr Eliat Aram, PhD MSc Occup Psych MSc G Psych, CBAM, Dip IoD

Company Secretary
Dr Leslie Brissett JP, PhD MSc (Econ) BSc (Hons) FHM-SA

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STRUCTURE, GOVERNANCE AND MANAGEMENT

The Tavistock Institute of Human Relations (TIHR) was established as a not for profit organisation with a charitable purpose in 1947. The Institute is governed by its Articles of Association dated 20 September 1947 as amended on 25 June 1963, 20 March 1991 and 22 July 2010. Ultimately accountable to members of the Tavistock Association, a Council of Trustees act as the board and work with the CEO and Management Team to deliver against the mission and objectives.

OBJECTIVES

The TIHR is dedicated to the study of human relations for the purpose of bettering working life and conditions for all humans within their organisations, communities and wider society and to the influence of environment in all its aspects on the formation or development of human character or capacity; to conduct research and provide opportunities for learning through experience for this purpose; to publish the results of such study and research; to further the learning of people in their organisations, to offer educational opportunities for individuals in or for any branches of the said study.

FINANCIAL REVIEW

Financial results for the year 2018-19
2018-19 showed a continuation in the improvement of the operating financials for the Institute which progressed this year with a net income of £213,514 compared to that in 2017-18 of £47,988, this representing a further step up in financial performance. This was achieved despite the increased contribution of £285,429 towards the defined benefit pension scheme (see Reserves policy below). All business streams saw an increase in revenue for the year, which is expected to continue in 2019/20.

The Institute is holding a provision of £117,585 at the end of September 2019 for potential costs related to its membership of the Menon Network EEIG following the bankruptcy of a fellow member of the EEIG and which will impact the EEIG and its members. The Institute is retaining the remaining provision to cover any further payment settlements related to other EEIG projects.
Reserves policy
The Trustees recognise the need to hold reserves both to enable the Institute to progress its long term projects and to protect its current activities. The Institute believes that a reserves level of three months’ income is appropriate for the ongoing operations of the organisation. Of the accumulated reserves on September 30, 2019 of £671,928 (excluding the pension fund liability), an amount of £45,661 is invested in operational assets and this amount is not available to meet ongoing expenditure. The unrestricted free reserves are £626,267 which represents 4 months of future expenditures.

The Institute continues to fulfil its obligation as per the pension recovery plan with the pension trustees (approved by the pensions regulator) whereby the deficit will be paid within 15 years. During the year ended 30 September 2019 the Institute paid £285,429 in accordance with this plan. The actuarial valuation of the Tavistock Institute of Human Relations Retirements Benefit Scheme at 30 September 2018 for the purposes of FRS102 showed an increased funding deficit of £5,962,000 (2018: £4,175,000). This is due mainly to a drop in the discount rate from 3% to 2% which resulted in a £1.9 million actuarial loss on the defined benefit obligation.

Risk management and internal control
The Trustees have a duty to identify and review the strategic, business and operational risks that the Institute is exposed to, and to ensure that appropriate controls are in place to provide reasonable assurance against fraud and error.

In order to achieve this, the Trustees and management team have undertaken an assessment of the risks that the organisation is exposed to and have produced a risk register which assigns management of these risks to specific individuals and recommends actions to be taken, where necessary, in order to manage the likelihood and impact of these risks. The risk assessment and resulting risk register are reviewed and updated on a regular basis. The most up to date review, in September 2017, confirmed the current primary risks to be the Brexit vote and any uncertainty and volatility it may create around work opportunities in the UK and Europe; we continue to monitor the risk of losing staff for various reasons although we think this has now subsided with the latest wave of recruitment and we continue to develop new streams of funding whilst keeping focused on saving costs wherever prudent.