

IN CONFIDENCE

INVESTORS IN PEOPLE REVIEW REPORT

For

THE PLUSS ORGANISATION

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INVESTORS IN PEOPLE

CONTENTS

1. Outcome
2. Strengths and Areas of Good Practice
3. Feedback against Agreed Objectives
4. Potential for Further Development
5. Continuous Improvement Plan

1. OUTCOME

Pluss continues to meet the requirements of the Investors in People Standard. I am pleased to confirm that recognition is therefore maintained as from 12 February 2009.

Pluss was first assessed three years ago but previously to this the organisation comprised of four separate enterprises which were independently recognised under the Investors in People Standard.

It is important to acknowledge the huge changes that Pluss Organisation is going through at present. The company is in the middle of a management restructure and has also recently divided the company into divisional areas instead of locality based unit management. There is work in progress regarding performance management which will have implications for the culture of pluss Organisation. Added to this the economic situation is having significant effects upon the manufacturing division in particular and as a result of this the company is in discussion with the unions regarding potential short time working or cut backs. Given this background I believe it is very significant that the majority of staff are still feeling positive about their employment experience, but unsurprisingly there were some who were feeling concerned about what the future might hold.

Currently 56% of the workforce is disabled and the majority of these will be on some type of funded programme to train and enable them, ideally to enter into the wider world of work at some time in the future.

2. STRENGTHS AND AREAS OF GOOD PRACTICE

I was impressed by the clarity of the vision for the future held by the senior management, and the work that is currently underway to ensure that the business plan is strategically and operationally appropriate for the current situation, and to meet the vision. There have been away days with the Board to consider the business purpose, vision, guiding principles and strategic aims and this work will cascade into Key Performance Indicators and meaningful targets in the next few months. The current Business Plan will then be rewritten. Four key project areas have been identified and these have Board Sponsors to move them forward. .

Of particular relevance to Investors in People is the appointment of a Sponsor or Champion for Training at Board level. This was partly as a result of an internal audit of the training function in the summer of 2008, and OFSTED had also raised some concerns at their last review. These reviews, in addition to some concerns held internally regarding the commitment of all management to providing a consistent approach, were the drivers for change in this area. I

believe it is indicative of the very proactive and self critical approach that the company has that they are continually evaluating the outcomes of their company strategies, and are not afraid to make sometimes difficult decisions to ensure that matters identified as being less than the standard required are corrected. One of the outcomes of the training review has been the move of the responsibility for training to the Human Resources Function. Some changes have already been implemented, and are others are still ongoing in this area. I believe that some of the positive reports that I have had regarding training have been influenced by these changes.

Despite the need felt for a change to the training structures and approaches I was very impressed with the amount and scope of learning and development in progress, and available. Without exception staff could give examples of the development opportunities they had received such as participation in NVO programmes; skills training e.g. engineering technical skills; IT training such as ECDL; Skills for Life assessment including numeracy and literacy; counselling programmes; teaching programmes, and many more subject areas. The reason this company exists is to provide training to enable disabled people in the workplace and as such learning is at the heart of the business. Perhaps some people do not actually appreciate what is available because it is so much 'the way we do things around here'.

The company also conducted a staff survey in 2007 and the one of the key strengths identified at that time was that a 'high proportion of respondents felt positive about working for Pluss Organisation', which echoes the comments I received. The opportunities for improvement covered four areas. These were better management; acting on the results of the survey; better communications, and cross divisional working. Management took all these points on board and have made great efforts to improve in all areas. For example senior management now regularly visit all sites, and have personally been briefing staff about the current situation and the Recovery Plan being put into action. This was recognised by many of the staff I spoke to and it was encouraging to hear that there was a feeling that communications were getting better.

Senior Management have identified that the capabilities of the middle managers are key to the success of pluss Organisation. They have carried out work to identify the knowledge, skills and behaviours required by management and sourced an external provider, Righttrack, to put in place a management development programme. This programme is almost completed now and evaluation has been going on to consider how to take the results forward. Senior management are beginning to see changes in the behaviours of some managers and it is recognised that some people have taken great advantage of the opportunities afforded by this programme. The company is actively considering what options might be pursued to assist the senior management to reinforce the learning from the modular management development programme which is being attended by their direct reports. Activities being considered include one to one coaching for example.

Over the next few months work will be continuing to restructure the management levels and this will include reviewing the roles and responsibilities of all management posts, and the skill sets necessary to carry out the role.

It was good to hear that management are generally perceived as being 'good to work for'. There were many positive comments about the support given, and this extended to supervisors also.

There are also a number of specific subject area development activities in place. For example project management skills are being concentrated upon to support the project approach the Board has adopted for certain key areas.

At the time of the Investors in People assessment three years ago a new appraisal system had just been introduced. This was a sophisticated and detailed process produced by a consultant. However, following a review it has been recognised that the process does not fit with the working style and culture of the organisation, it was just too complex and not user friendly. I am glad to say that despite the shortcomings of that particular scheme the majority of staff happily reported that they had plenty of opportunities to talk with their manager about their learning and development needs, using a variety of less formal approaches. Some people have supervision sessions at regular intervals; people on the Workstep programme receive 6 monthly reviews from their employment consultant and manager; and even those that do not have a formal process appear to have no difficulty in spending time with their manager whenever they or their manager feel the need. As a result of the appraisal review this whole process is also being rethought and a new simpler strategy and process will be put in place.

There is a very full process for staff consultation, and various mechanisms to allow feedback up and down the management chain. There are a range of structures in place to facilitate this including Communications Champions, a Joint Consultative Committee, and Health and Safety committees. Union relationships are generally healthy and productive and these sound relationships are important in the current economic climate when negotiations are underway regarding such issues as short hours working.

One of the key strengths that I noticed was the ability of people to take responsibility for their own roles. I received many comments about how people were very happy with the freedom they were given within their job to run it in their own way, to have opportunities to be creative about the processes used, and to really have a sense of pride and ownership for the outcomes.

A new initiative underway is that the Human Resource Department is identifying the skills of staff across the company which might be outside the skills and experience of the actual role they perform – building up a 'skills available matrix'. It is believed that there are many people

who could be well placed to provide guidance and support to others in a range of activities. Although much informal help is already given to colleagues the management believe that this could be a valuable way forward, and an economically sound one in the current climate.

A final point that was very impressive is the caring approach of the company to the staff. I spoke to many people who had a disability, had developed an illness or who had domestic difficulties. Without exception staff are fully supported and every effort is made to help them back into the work place at a time and place appropriate to them. Often this meant moving sideways in a role, or taking a step back, perhaps to relieve stress. In each case the concern and support given was excellent and employees recognised how well they had been treated. Many commented that they would not have received such care from other organisations.

Quotes:

'Pluss Organisation do move people forward'

'We deliver Skills for Life for any employee'

'Communications are OK as far as I am concerned'

'I think they are making the effort to keep us informed'

'I love working here'

'One of the most caring companies I have worked for'

'I enjoy it, I haven't had a problem'

'He's (my manager) very effective'

'They reward me by not being on my case, they do value me'

'Pretty self regulatory, know what we have to do. Work on my own but very much part of a team'

'The manager has improved, regular meetings now, communications are excellent'

'Good company, it's getting back on track'.

3. FEEDBACK AGAINST AGREED OBJECTIVES

Changes to the agreed Plan for this visit were where certain staff had not been available on the day because of sickness for example - but this did not significantly affect the percentage seen. The company had also arranged a certain number of small group interviews, and some had to be carried out by telephone due to the widespread localities. In one instance a disabled worker was accompanied, at his wish, by a supervisor to enable the conversation.

I reviewed all the development suggestions from the 2006 Assessment with the Human Resources Manager and progress had been made in many areas. For example Health and Safety refresher training is now undertaken according to a schedule which ensures everyone is identified at appropriate times.

The HR Manager also asked for some feedback on what impact the move to a divisional structure had had on training and I reported back that I could see no evidence of this at present. I was also able to report back that although on the job training might not always be specifically recognised and valued by name by managers and staff, the evidence was that indeed it was valued in practical terms as it was a significant part of the training process.

4. POTENTIAL FOR FURTHER DEVELOPMENT

Build upon the current evaluation methods regarding the management development programme by identifying ways of assessing medium and long term outcomes. Also ensure that the Board is fully briefed of the outcomes and value for money on this programme. Continue your excellent work in enabling management to understand what is expected of them within the emerging culture and to gain the knowledge, skills and experience to produce the results required.

Quote:

'Pretty good, but some (managers) have their own agenda'

You might consider having a further staff review within 2009, or even a further Investors in People review along the new choice lines we discussed. Staff are expecting a follow up to the staff survey as this was originally promised and it will be important to keep faith with them over this, but in the most cost effective way. Consider using our [Staff Survey](#) service to help you identify and track staff feedback. We can provide questionnaires for top managers, managers and people levels for the Investors in People Standard. Survey reports show how many (and what percentage of) people chose each answer to each question and can be broken down to show results by department or location. The surveys are completely confidential. Your assessor or adviser can set this up for you.

I suggest you give even more detailed thought to your communications processes to ensure that you are reaching all members of staff. Although I am quite comfortable that the majority are receiving the cascaded communications from senior management I believe that some staff may not be able to actually fully understand what is being said or written in the current format. Although it takes extra time it is important that all who need them should have enablers available to 'translate' the information into appropriate language. This may need to be initiated by management rather than relying on the individual to ask for help. Equally it may be useful to consider some type of development for staff who are responsible for others, to ensure they know the best way of getting across messages, and checking to see that these have been fully understood. I believe that it might reduce the concerns of some staff if they

comprehended the logic and reasoning behind the Recovery Plan for example. I know you are working with a benefits adviser at present and some staff could be greatly reassured to know that this is in progress. Staff would also benefit from understanding the logic behind the appointment of senior staff or other costly initiatives e.g. the new Healthcare process, while cutbacks are in progress.

Quote:

'It's not in clear language'.

'Good communications, they try to give us as much notice as possible, but I asked a question and got two different answers'

I would encourage you to implement a consistent but simple method of developing one to one discussions with all staff to continue to ensure that everyone has the opportunity to discuss their training and development ambitions. This also links in to identifying those who have career ambitions and who you may wish to track or guide in some particular way.

Perhaps some managers might need reminding that part time staff must always have full access to all communications, particularly if they do not have access to PCs in the normal course of their work.

From 2009 Investors in People will offer 'new choices' in the way organisations undertake their reviews. You are encouraged to use relevant parts of the extended Investors in People framework (currently Profile) in future as it provides a wider-ranging framework of good practice. Using the Investors in People Standard as a foundation it also embraces a wide range of people management issues which are not contained in the core Standard itself. The wider framework can be used very effectively as a tool to help drive continuous improvement and it is recommended that you identify relevant areas from the framework which I gave you to support your business development now, and then be reviewed against these at your next review to assess the outcomes and plan further development (N.B. you must be reviewed against the core Standard to retain your IiP status). As well as providing ideas for business development and detailed feedback this could offer you an opportunity to benchmark your performance across the range of people-management and development activities by comparing your organisations achievement to averages for other employers.

www.investorsinpeople.co.uk provides guidance on working with the wider framework and 'new choices' including case studies and a free on line tool.

Our Investors in People **Networking Club** provides the opportunity to meet other organisations in your area to share experiences and ideas and improve your business knowledge. Visit our website at www.qualitysouthwest.co.uk to find out more and book your place. These events are free.

Visit Quality South West's website to maintain a view of the developments around the Investors in People Standard and for details of our **workshops and events** across the region: www.qualitysouthwest.co.uk

Check if any of the **Health & Safety** information available on the HSE website could be useful in maintaining both your compliance and staff awareness. Your Health & Safety Representative might consider if there are any issues that should be addressed: www.hse.gov.uk.

Consider interactive training packages to continue to develop the **IT skills and knowledge** of your staff. Try www.learndirect.co.uk for ideas, a good number of these courses are either free of charge or reasonably priced.

For some useful information on the whole area of **employee consultation**, try looking at either www.dti.gov.uk/er/consultation/proposal.htm or www.acas.org.uk

For general **business advice and employment legislation**, incorporating DTI 'best practice', the following website might be useful: www.businesslink.gov.uk/.

With regard to **Leadership and Management**, visit the Institute of Leadership and Management at <http://i-l-m.com>. www.ashridge.org.uk/ includes access to some interesting reports as well as E-Learning resources, whilst www.leadershipsouthwest.com/ will provide you with lots of information from a more local source.

You are very involved with **Train to Gain**. As you know it is a free and impartial assessment that will give you access to a wide range of training provision, some of which may be funded. Please ring 08456 047047 or visit www.traintogain.gov.uk if you wish any further input.

If you would like further advice tailored to your own particular circumstances and needs to assist you in line with the findings of this report, **Quality South West's Advisory Service** will be more than happy to assist. For further information please visit <http://www.qualitysouthwest.co.uk/Advice.asp> or ring the Customer Services Manager on 01452 420913 for details of our service packages.

The basis of a Plan has been prepared on the next page to help you move forward by addressing the development areas identified during this visit.

5. CONTINUOUS IMPROVEMENT PLAN

The first column of this Plan has been completed for you as a basis for moving your organisation forward.

| Suggestions for further development | Action agreed | Responsibility | Date |
|---|---------------|----------------|------|
| Management development evaluation | | | |
| Continue the staff survey process | | | |
| Clarify communication | | | |
| Development of training and career aspirations identification | | | |
| Consider part time access to communications | | | |
| | | | |

Date for your next Investors in People Review: February 2012