

INVESTORS IN PEOPLE ASSESSMENT REPORT

Leathermarket JMB

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Investors in People Assessor

On behalf of Inspiring Business Performance Limited

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Project Number 13/5014



INVESTORS
IN PEOPLE | South



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■ Introduction

This report represents the feedback from the Review of Leathermarket JMB (hereafter referred to as LJMB) against the Investors in People Standard, which took place on 22nd November 2013.

During her time on site and in a few phone interviews, the Assessor interviewed 12 of the 49 people in the organisation as detailed in the Review Plan. The interviews took place at LJMB's premises in central London.

The Assessor would like to thank LJMB for the welcome afforded her – in particular Adam Evans for his help in ensuring that the on-site activity went smoothly. All interviewees were receptive and responsive, and their contributions are very much appreciated.

Leathermarket JMB is a large resident-managed housing organisation, managing 1500 homes. The organisation was established in 1996 by a group of tenants, to empower local residents and give them more autonomy over areas such as cleaning and repair services. As a result of a ballot, residents voted to set up LJMB as a Tenant-Managed Organisation (TMO), under the Government's 'Right to Manage' legislation.

The organisation now provides services such as rent collection, gardening, repairs and improvement works and assorted customer service responsibilities. There are just under 40 staff, formally run by a board of elected resident Directors. The Board with its various sub-groups is responsible for strategic planning and decision-making.

At the last Assessment in February 2013, the organisation did not meet all the Evidence Requirements from the core Standard. This was therefore an assessment of those ERs that were not met, to enable the organisation to return to the Standard.

As well as detailing evidence against the relevant Evidence Requirements of the Investors in People Core Standard, this report highlights both areas of good practice and the areas for development that could be addressed. These will help LJMB to continue to meet the Standard, meet their key priorities, and also contribute to the continuous improvement of the organisation as a whole.

(Sensitive information, such as financial figures and individual names, has not been specified in the report, to maintain client confidentiality.)

The organisation was first accredited in 2003. An extension was granted for the previous Assessment; therefore after this Assessment the deadline for the next one will revert to December 2015.

■ Executive Summary

Leathermarket JMB has clearly taken the feedback from the previous Assessment extremely seriously, and is to be commended on the hard work that has gone into addressing the gaps in the Standard, and the patent progress that has been made as a result. The organisation found the report from February 2013 very valuable, and having fully comprehended the areas where they needed to develop, has taken numerous steps to do so.

A concerted effort has been made to communicate more effectively with staff, particularly around the requirements for people managers, and also a lot of consideration has gone into aligning training with business objectives, making much more explicit and better-understood links between the Business Plan and the Training Plan.

Various workshops have taken place to involve people in business and training planning, identifying and communicating leadership and management capabilities etc. The approach to training planning is now far more robust - more effective actions are now taking place to clarify training, learning and development outcomes as well as to evaluate the extent to which these have been met. There is far more lucidity around the impact that learning and development is having on performance, both at an individual and collective level.

There have also been other benefits to the improved communications and training planning, such as increased inclusivity, more involvement of Directors and more staff across the organisation, and staff in manual roles such as cleaners having a better understanding of the impact and value of their roles within the organisation.

Management effectiveness has improved since the qualities required by line managers have been specified. There does seem to be some inconsistencies in management effectiveness between individuals but this is only to be expected and is likely to reduce over time as the leadership and management qualities become more embedded.

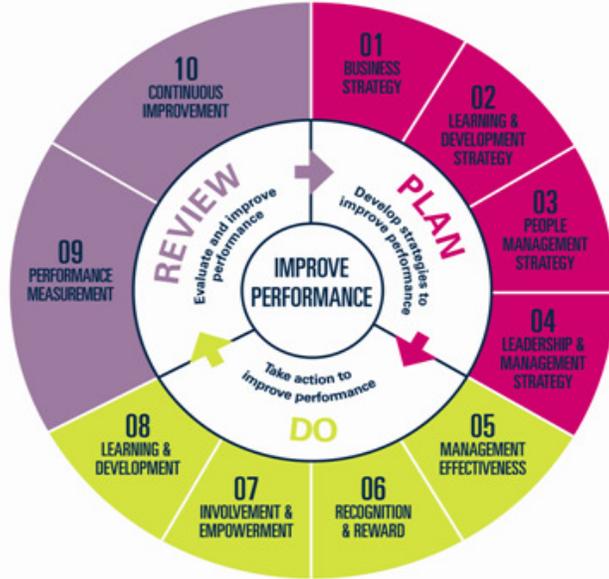
Interviewees were on the whole able to give far more considered, evidential responses than at the previous Assessment, with various examples, clarifications and confirmations given.

It is recommended that joint director/manager training or briefing is arranged, aimed at making sure that everyone has a good grasp of the organisation's strategic objectives, the contribution that the approach outlined in this report may make in helping LJMB to achieve these objectives, and on how the organisation could take chosen recommendations forward.

The assessor is therefore satisfied that LJMB now meets all the requirements of the Investors in People Core Standard. There is evidently further work to do and more plans in place, such as identifying the skills, knowledge and behaviours required for Directors as well as managers, but the Assessor is extremely pleased with the advancements made over the last nine months, and looks forward to seeing even more improvements and fulfilled potential going forward!

■ **Assessment Findings**

The report sets out these findings based on the Investors in People Standard as shown in the diagram below.



LJMB produced an Action Plan to return to the Standard following the last Assessment. This focussed on ERs not met at the Assessment, which were related to leadership and management capability, and planning, review and evaluation of investment in training, learning and development. This Assessment therefore focussed on the following:

1. Raising awareness and understanding of leadership and management capabilities - LJMB should now have clearly defined leadership and management skills, knowledge and behaviours that all staff should be able to discuss and give examples of these being used in practice.
2. Learning and development planning – Top managers and managers should be aware of the learning and development needs for the team, and know how these will be met and how success will be measured.
3. Continuous improvement through how people are trained and developed -Top managers should be able to broadly quantify the level of investment in training and development and identify how the organisation has benefited from this investment. They should also be able to discuss how their evaluation of training activities has lead to further improvements and developments here.

Are leadership and management capabilities effectively defined, communicated and implemented? (Indicators 4 and 5)

Much progress has been made in consulting with staff at all levels in order to explicitly define what being a JMB staff member means, and this has included clarifying additional qualities required of managers. These have been discussed, documented and displayed, and include:

- Supporting team members with both professional and personal issues
- Giving motivating praise and constructive feedback
- Managing and reviewing performance and dealing with under-performance
- Being knowledgeable about the job
- Improving their own and their team’s performance through training, learning and development
- Managing staff and workloads effectively to provide high levels of service to residents

Staff at all levels now seem familiar with these requirements, and many examples were given of these being put into practice effectively. These included supporting staff with work-life balance issues, carrying out five individual performance reviews per year, holding effective team meetings and ‘Toolbox Talks’, setting clear objectives and work plans for staff, communicating openly and taking action to address unsatisfactory work standards.

Those interviewed were extremely positive about their working relationships with their line managers and how they felt they were being supported by them in their roles.



Bright Ideas – The work that has been done on describing the requirements of line managers is excellent progress, and while not extremely comprehensive, is a solid foundation on which to build. LJMB may wish to consider further refining these to separate the requirements into Knowledge, Skills and Behaviours. A simple example of this is given below:

Knowledge	Skills	Behaviours
<ul style="list-style-type: none"> • Understand Health and Safety Legislation so that it can be effectively applied in practice • Has a basic understanding of Employment Law so that all team members are treated fairly, respectfully and in line with the Law • Understands the company appraisal 	<ul style="list-style-type: none"> • Is able to carry out an effective and motivational appraisal • Is a good communicator and able to use a wide range of techniques to ensure messages are understood • Inspires and motivates the team using a broad range of motivational 	<ul style="list-style-type: none"> • Involves others and is able to build cooperation where team members feel valued and empowered • Is receptive to ideas, identifies alternatives and involves a wide range of people in the planning process • Continually provides constructive feedback,

<p>process and the requirements of an effective appraisal</p> <ul style="list-style-type: none"> • Has a good knowledge of the company disciplinary process in order to manage poor performance 	<p>techniques</p> <ul style="list-style-type: none"> • Manages people according to company procedures • Challenges poor performance and manages the consequences 	<p>where staff feel valued and motivated to perform to high levels</p> <ul style="list-style-type: none"> • Presents ideas so the whole team can clearly understand what is being communicated • Performs to their highest level and leads by example
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Is training, learning and development effectively planned (Indicator 2)

There are now undoubtedly much more robust links between the training and development activity taking place, and the objectives, outcomes, aims and targets in the Business Plan, and a significantly increased understanding of the importance of making these connections in order to improve organisational performance – particularly at top manager/manager level. Interviewees emphasised the need to ascertain relevance and benefit of training at the planning stage, rather than taking an ad hoc approach.

Learning outcomes appear to be addressed more frequently prior to training activity taking place, so that there is more clarity around how successful the activity has been. Individual learning and development portfolios help to document this.

Learning planning also now involves considering using different methods and sources of learning, such as e-learning (webinars etc.), internal and external providers, paid and free sources etc., to ensure that it is the most appropriate and cost-effective plan.

As a result, the organisational training plan is now more focused and tailored to achieving the needs of the JMB as well as individual needs. As directors look at training needs and approve training spend, training has taken place for them on what that means and what the implications are, so that they can make more informed decisions and planning.

Some examples given of the training currently planned include health and safety topics, people management training such as leading and managing teams, CPD, fraud awareness and objective setting.



Bright Ideas – LJMB can continue to build on identifying successful learning outcomes by being even more specific about what training activity should achieve. When setting learning objectives for trainees, the learning objective should answer three questions:

- What should the learner be able to do? (Behaviour)

- Under what conditions? (Condition)
- How well must it be done? (Standard)

For example:

By the end of this course you will be able to analyse the three main components of a profit and loss account linked to accounting standards using a case study

By the end of this session you will be able to score at least 70% in a multiple choice test on Health and Safety legislation

By the end of this session you will be able to repair a machine within 30 minutes with no assistance

Does review and evaluation take place effectively? (Indicators 9 and 10)

There has been notable progress on evaluation of the effectiveness of training, as well as identifying exactly how learning and development contributes to the achievement of organisational objectives. Some of the improvements here include:

- Revising the performance management process so that now staff have five brief reviews a year, that include looking at training that has been done, how effective it was, how it will be put into practice and any further training needs identified.
- People attending training and then sharing their learning with colleagues back at work
- Evaluation sheets completed following training courses
- Looking at the cost-effectiveness and convenience of different learning methods, rather than just sending people on courses.

Top managers were able to broadly quantify the level of investment in learning and development, including a set training budget of £XXXXXX per year, as well as non-financial investment in terms of time, people and resources (e.g. the additional time spent on staff reviews). The return on investment now seems to be far better understood, mainly through linking everything back to the impact on the organisational objectives. For example:

- Understanding the impact of welfare reforms on residents and what this means for the services provided to them – impacting on resident satisfaction
- Fraud training to ensure staff are aware of benefits fraud etc. – impacts on rent collection rates
- Training on hoarding/hoarders – has helped to improve properties affected by hoarding and therefore meet the Decent Homes Standards and improve the stock assets of the organisation.
- Health and safety related training, such as Asbestos, directly contributing towards the objectives of meeting health and safety requirements and safety quality standards of buildings and estates.

Decisions on future training plans have been made as a result of evaluation activity, such as:

- What training should be repeated and what shouldn't
- Identifying further development needs for individuals, e.g. line management training
- Whether or not to use certain training providers in the future

- Use of alternative learning resources such as online, free seminars etc. that are more cost-effective
- Deciding if training should be rolled out to more staff
- Deciding if training should be delivered internally for a group or send individuals on external events



Bright Ideas – Clearly some constructive conversations are now taking place to look at evaluation training and learning effectiveness and maintaining links with the Business Plan objectives. LJMB could now consider how to structure and document those discussions more consistently. (See Annex C for some examples).

Recommendation and Next Steps

Having carried out the assessment process in accordance with the guidelines provided for liP Specialist by Investors in People – United Kingdom Commission for Employment and Skills, the liP Specialist is now totally satisfied that **Leathermarket JMB** meets the requirements of the Investors in People National Standard.

Investors in People accreditation is granted indefinitely, with a proviso that an interaction is undertaken within 18 months of accreditation and full assessments take place no greater than 3 years apart. Assessments can be undertaken at any time and more frequent assessments are recommended to maintain levels of good practice and continuous improvement.

The organisation should discuss the timing of the next assessment with their liP Specialist, using the Improvement Planning Meeting/18 month interaction to agree the best strategy for future use of the Investors in People framework.

Investors in People Interactive

This **free** online support tool is designed to guide you through development activities and help you maintain the benefits of using Investors in People as an organisational development tool. Obtain an on-going understanding of your organisation's current strengths and development areas by using the tool's diagnostic function which is built around 5 management practices which relate directly to the Investors in People indicators

You can also review and update your progress within the tool and access a wide range of downloads, good practice tips, templates and other resources to inspire and inform - no matter where you are on your Investors in People journey

www.investorsinpeople.co.uk/interactive

Client Feedback

Both the IiP Specialist and IBP would welcome your feedback on this assessment and you will shortly be supplied with a Client Feedback Questionnaire to complete. We would very much appreciate it if you would complete and return the questionnaire after your Improvement Planning Meeting has been concluded.

Should you wish to contact an Account Manager at IBP for any reason, please telephone 0800 612 3098, use the contact option on our website www.inspiringbusinessperformance.co.uk or send an email to info@ibp.uk.com

Promoting Continuous Improvement

IBP offers an integrated advice and assessment support service, workshops, surgeries and networking events to promote continuous improvement and maximise the benefits of working with The Standard. We also work with a team of highly experienced consultants to offer an extensive range of tailored business support and organisational development solutions to help improve business performance. Details of the support available to you can be found on: -

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www.inspiringbusinessperformance.co.uk

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25th November 2013

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■ Annex A: Evidence Summary

Plan

“We’ve married the objectives of the organisation with the Business Plan and the learning and development plan – we’re working systematically to meet the organisation objectives”

“We’ve had training as managers – being a manager doesn't stop at getting the job done, it's also about staff welfare and supporting their need, like their work life balance”

“I’ve been trained with ACAS on dealing with sickness and difficult staff issues”

“During the business plan discussions, we’ve talked about that [what managers should be doing”

“In our staff 1-1s, we look at the management expectations and the team is asked for feedback around those”

“We had separate discussions with managers and staff about what a good manager looks like and discussed it in the business planning workshops, and came up with the qualities.”

“We’ve picked up on idea of CPD so managers now need to take responsibility for their own development.”

“We’re trying to use various different resources, e.g. on the Web, for relatively low cost learning”

“If someone asks for training, we check the business plan to see if it's relevant to what we're trying to do”

Do

“If someone's not doing their job, you expect their manager to pull them in and have a word about their concerns”

“If someone not performing, I'll look at it informally first and see why it's happening and what the background is. I'll see if they have everything they need, like training to do the job”

“We do reviews five times a year now to look at job performance and training”

“[Manager] leads by example – s/he puts him/her self forward for training and shares it with everyone afterwards”

Review

“Sometimes training looks great on paper but it’s not really beneficial – the only way we know is to talk to staff who have attended it and ask them how they will use the training to help tenants”

“People meet with their manager and fill in evaluation form after courses, to see if it met their needs and also the needs of the organisation”

“Training is now more driven by business needs rather than by people just saying they are interested in something”

“We’ve got an Excellent Employees/Excellent Employers section in the Business Plan now, to look at how staff help us deliver objectives”

“Staff go on training knowing that they will need to brief their manager and team on it afterwards”

“We had a Directors Conference for 2 days with lots of different workshops to do – afterwards we filled in forms about what we liked and didn’t like, what else should have been included, then we came back and had a meeting to discuss it”

“We feed back to the Staffing group to discuss if [training] has satisfied the needs of the training plan - has the investment been worthwhile”

Annex B - Outcomes Table - Evidence Requirements Framework Matrix

Core Standard										
Total number of core evidence requirements assessed - 10										
Total number of core evidence requirements met - 10										
	Indicators									
ERs	01	02	03	04	05	06	07	08	09	10
1		✓		✓	✓				✓	
2		✓		✓					✓	
3				✓	✓				✓	
4										
5										
6										

Wider Framework										
Total number of additional evidence requirements assessed – n/a										
Total number of additional evidence requirements met – n/a										
	01	02	03	04	05	06	07	08	09	10
4	Core	Core	Core		Core				Core	
5	Core		Core						Core	
6	Core									
7										
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Annex C – Examples of evaluation documentation

Evaluation - 2-4 weeks after event

This is to find out a bit more about the course or learning and development activity you did 2-4 weeks ago and how beneficial it has been. The information is important as it helps us evaluate how successful the activity has been. We will also use some of the data for analysis as part of our organisational evaluation. You should refer to the pre-course questionnaire you completed, to see whether you achieved what you set out to do. You can either complete the questionnaire by yourself or have a discussion with your manager about it.

Name	Job title
Course/L&D activity undertaken	
Date this form completed	Date of course/L&D activity
<p>To what extent did the course/L&D activity cover all the areas that you required? (Please circle)</p> <p>Not at all 1 2 3 4 5 6 7 8 9 10 Completely</p> <p>Please give examples or further comments:</p>	
<p>To what extent was it at the right depth and level of detail for you? (Please circle)</p> <p>Not at all 1 2 3 4 5 6 7 8 9 10 Completely</p> <p>Please give examples or further comments:</p>	
<p>How relevant was the course/L&D activity to you? (Please circle)</p> <p>Not at all 1 2 3 4 5 6 7 8 9 10 Completely</p> <p>Please give examples or further comments:</p>	

<p>How much did it meet your needs? (Please circle)</p> <p>Not at all 1 2 3 4 5 6 7 8 9 10 Completely</p> <p>Please give examples or further comments:</p>
<p>How useful or appropriate was the learning method to you? (Please circle)</p> <p>Not at all 1 2 3 4 5 6 7 8 9 10 Completely</p> <p>Please give examples or further comments:</p>
<p>How enjoyable was the course/L&D activity?(Please circle)</p> <p>Not at all 1 2 3 4 5 6 7 8 9 10 Completely</p> <p>Please give examples or further comments:</p>
<p>How will it be applied in the job role/workplace?</p>
<p>Was this an externally provided or internally delivered event?</p> <p>Would it have been any better/worse if it had been the other?</p>
<p>What other learning and development activities can/will you use to reinforce what you have learned?</p>
<p>What further actions do you have as a result of this course/L&D activity?</p>

Evaluation - 6-month review

This is to find out a bit more about the course or learning and development activity you did some months ago and how beneficial it has been. The information is important as it helps us evaluate how successful the activity has been. We will also use some of the data for analysis as part of our organisational evaluation. You should refer to the pre-course questionnaire and the 2-4 week questionnaire you completed, to see whether you achieved what you set out to do. You should discuss the below issues with your manager approximately 6 months after the course/activity.

Name	Job title
Course/L&D activity undertaken	
Date this form completed	Date of course/L&D activity
Briefly, recap on the knowledge/skills/abilities etc learned	
<p>To what extent have you used these in your job role? (Please circle)</p> <p>Not at all 1 2 3 4 5 6 7 8 9 10 Completely</p> <p>Please give examples or further comments:</p>	
<p>To what extent do you feel you have improved in these areas of your work as a result of the learning and development activity? (Please circle)</p> <p>Not at all 1 2 3 4 5 6 7 8 9 10 Completely</p> <p>Please give examples or further comments:</p> <p>If you don't feel you have improved, why is this?</p>	

What other learning and development activities have you used to reinforce what you have learned?

How useful or appropriate were those other activities to you? (Please circle)

Not at all 1 2 3 4 5 6 7 8 9 10 Completely

Please give examples or further comments:

Which of these activities were most/least useful, and why?

Have you identified any further learning and development needs as a result of this evaluation? What are they?

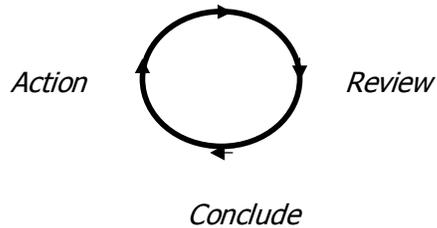
Learning Log

The different elements of this learning log will be used to help evaluate this learning activity and how you have benefited from it.

Name	Date
Learning/training experience	

Learning Cycle

Experience



Review and conclusions

State 3 key things that you have learned from this experience:

1	
2	
3	

Action points

State 3 things that you are going to do as a result:

	Action	By when
1		
2		
3		

Learning and development record

Name	Job title	Department
Dates – From:		To:

Date	Topic	Learning Objectives	Description	Learning outcome	Follow up
<i>Date the activity took place</i>	<i>Main subject or course title</i>	<i>What were the main things you wanted to get out of the event or activity?</i>	<i>What kind of activity or event was it?</i>	<i>What were the key things you learned?</i>	<i>What additional learning activities might you do as a result? How have you used what you have learned in your job role?</i>
EXAMPLE 19 March 2013	Client Service Skills Course	To learn customer service techniques, which will improve my customer services skills	Half day interactive seminar	<ul style="list-style-type: none"> • Learnt a completely new approach to customer service and making it work for me in both personal and professional life • How important the mind set is • Different techniques to develop and deliver Client Service Offer • Learnt some very valuable skills and tools that can be used immediately to improve my personal customer centricity and that of the team 	June 2013 – have been using these principles and techniques in all my day to day work and have been giving feedback to team when appropriate and encouraging them.

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