

Commercial in Confidence



Investors in People
First Assessment Report

Maple Building Services Ltd

Assessor: Allan Brown

On-site date: 18th September, 2008

Recognition date: 30th September, 2008

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1. Introduction

Founded back in the early eighties Maple Building Services Ltd offers a unique personal service for discerning clients in both the residential and commercial sectors. The company prides itself on its close working relationship with new and returning clients, and this personal service built on strong business ethics has seen the business flourish with a turnover currently in excess on £3 million.

Staff comments showed quite clearly that they were proud to be associated with what is clearly a success story - and felt to a person that the future prospects for the business with its plans to diversify into new markets and services were extremely positive – the only frustration felt by one or two members of staff was that they wanted this diversification to happen sooner rather than later.

All members of staff were keen to participate during the assessment and gave their views openly and in a most constructive manner.

2. Assessment and Client Objectives

There were four primary objectives for the assessment, namely:

- To ascertain whether the organisation meets the evidence requirements of the Investors in People National Standard
- To celebrate and highlight good practices evidenced during the assessment
- To identify potential opportunities to further improve on current working practices
- To provide informal feedback and a recommendation at the end of the interview process.

There were no additional objectives identified by the client prior to the assessment.

3. Assessment Plan

Appendix II shows the plan for the assessment.

In addition a number of supporting documents were made available to the assessor prior to and during the assessment itself – these included:

- Organisational structure and staff listings
- Minutes of Management meetings
- Examples of Staff Communications
- Job Chat examples
- Business Plan June 2008
- Equal Opportunities Policy
- Job Description example
- Company Training Plan 2008/9

4. Executive Summary

The key findings of the assessment indicate that Maple Building Services Ltd meets the evidence requirements of the current version of the National Investors in People Standard. The summary below represents the assessment findings within the context of identified selected strengths and suggestions for further development:

4.1. Key Strengths/Good Practice

- There was consistent feedback from staff that demonstrated that there was an effective working relationship between all team members.
- Leadership & Management is a key strength supported by a highly motivated and focussed team.
- The company is actively multi-skilling its team to maximise flexibility – an essential ingredient in companies of this size.
- Staff spoke of a management team that leads by example and would not expect staff to do what they were not prepared to do themselves.
- Staff morale is generally positive, with highly motivated team players.
- Communication continues to be a challenge for most organisations – staff felt that the balance between the informal and formal was about right and entirely appropriate for a company of this size.
- Job Chats with the MD have proved useful and has enabled an open dialogue between management and staff to take place on a wide range of subjects.
- Continuing investment in staff has played a key role in maintaining and improving overall business performance.
- Staff did feel valued by the company and felt that their ‘overall package’ and the way they are being trained and supported was far better than many of their competitors.
- There is a strong sense of ‘we succeed or fail together’ – certainly no ‘them and us’.
- The company uses its internal expertise well, with good support being offered to its Apprentices and other new joiners by experienced tradesmen.
- The company have established working practices that are normally associated with much larger organisations – they are well placed to manage planned growth in the future.
- Induction of new staff continues to be fully supported with appropriate training to ensure that staff are able to contribute effectively at the earliest opportunity.

Maple Building Services Ltd

- The business is built on strong work ethics with the needs of the client taking centre stage.
- The training of all staff as First Aiders is clearly good practice and reflects the values held by the MD that staff welfare is a key priority.
- The company is determined not to fall into the trap of having 'all its eggs in one basket' – planned diversification will go a long way to ensure its future prosperity.
- Weekly operational management meetings ensure that projects and programmes are progressed inline with clients expectations – issues arising are then cascaded to staff on a 'need to know' basis.

4.2. Business Improvement Suggestions

- With much of the training and developmental needs of the staff being met 'in-house', it may be useful for *each* team member to maintain his/her training log/CPD file – this will ensure that this important aspect of staff development is recorded and recognised as an important element of staff development.
- The revised standard focuses more heavily on the need to allow staff at all levels to play a more active role in the planning processes – not necessarily to make decisions but to be part of the discussions prior to the formulation of business plans. It may be useful to circulate the plan in summarised draft format and obtain the views and ideas of staff at a team meeting.
- The assessor recognises the importance of client feedback – the company have regular project reviews with key clients. However it may be useful, (and most organisations are keen to participate), to carry out periodic client surveys to benchmark the performance of the company against the key deliverables of each contract, (this demonstrates to clients that the company is focussed on continuous improvement and on fully meeting their requirements).
- The senior management team may find it useful to periodically survey staff, (say every two years), to obtain feedback on their perceptions as to the effectiveness of management within the company – the IIP UK website is a useful source of survey options.
- At present the MD carries out all of the 1:1's – it may be prudent to delegate some of the reviews to other members of the management team, particularly in the light of planned business re-organisation to facilitate planned growth.
- The company may well wish to explore the opportunities that are on offer under the governments 'train to gain' programme – this may be a useful revenue stream particularly for administrative staff.

4.3. Additional Objectives Feedback

There were no additional objectives identified by the client at the planning meeting.

5. General Findings Relating to the Principles of the Investors in People Standard

Principle One – Developing Strategies to Improve the Performance of the Organisation

COMMENTS IN RELATION TO

- The strategies for improving performance
- Strategies for learning and development
- Strategies for managing people
- Strategies for leadership and management

One of the key aims of the Managing Director has been to ensure that the business continues to set the very highest ethical standards in the way it does business. The key values and behaviours that emerged from interviews included the following examples:

- Maintaining a professional image at all times
- Ensuring that Clients' remain the highest priority
- Safe Working Practices
- Personal Appearance including Uniforms
- Personal Behaviour

The Management Team are passionate regarding the above characteristics and actively 'practice what they preach' – as one member of staff commented, '*Say what you may the managers do lead by example, we all know what is expected of us*'.

Performance, in general, is monitored on a project by project basis via regular weekly operational management meetings along with feedback to team members. In addition, the annual job chats with the MD (see developmental feedback) provide an opportunity for more medium and longer term developmental issues to be openly discussed. – feedback from staff indicated that these meetings were positive and did give staff an opportunity to discuss openly their developmental needs – clearly the need to have a flexible and multi-skilled workforce is critical if key targets are to be met. The company has capability matrices that indicate current capabilities along with future developmental needs necessary to maximise the capabilities of its workforce.

Improvements in performance have been achieved in part by a rolling programme of refresher training using both internal and external expertise – this is both cost effective and also allows the training to be focussed on the specific needs of an individual rather than having to 'tap in' to a general college course

There is a mutual respect between management & staff that fosters a culture that is clearly aimed at ensuring that any issues arising are dealt with fairly. In general staff were aware of the companies aim to diversify into new markets and services - as one member of staff

stated, *'There are real opportunities here for staff to 'step up to the plate' and take on new challenges'*.

The MD has made a conscious decision not to be part of the regular weekly operational management meetings – he feels that delegating responsibility has to be seen to be working and only wishes to become directly involved on a 'need to know basis'. Matters discussed at these meetings include, (the key outcomes from which are minuted and cascaded to staff), include:

- Project Reviews
- New Business updates
- Labour Planning
- Quality Matters
- Health & Safety issues arising
- General Business News

Certainly staff felt that they were kept well informed and that nothing of any great significance was being hidden by the company, (staff were certainly aware of the diversification into new markets).

The company maintains close contact with its key clients as part of its continuing drive to further improve on its current high levels of performance – this is clearly good practice and can only bring medium and longer term benefits for the organisation, (the company may wish to consider the use of Customer Questionnaires for benchmarking purposes, (see *Developmental Feedback on page 4*).

The key words that reflect the strategy for managing people is 'respect and recognition' - all staff have a key role to play if the company is to continue to be successful and staff felt that they are encouraged to be fully engaged and involved and felt very much part of the team, as one member of staff stated, *'There is no hierarchy here, we genuinely all pull together'*.

Principle Two – Taking Action to Improve the Performance of the Organisation

COMMENTS IN RELATION TO

- The effectiveness of leadership and management
- Recognising and valuing contribution
- Encouraging ownership and responsibility
- The effectiveness of learning and development

The measure of management effectiveness is in part best evidenced by *edited* comments from staff received during the assessment, these included the following:

'The MD knows what he expects of us'

'The Management Team are prepared to 'get stuck in'

'They practice what they preach – they are very professional'

'The MD is very enthusiastic and clearly has a passion for the company'

'He is always prepared to get stuck in'

'There is a genuine open culture – nothing significant appears to be hidden'

'The support and training opportunities we get are really good'

'The MD is passionate about high standards'

'They are quick to praise and recognise contribution'

'They are receptive to new ideas'

'Strong family feel about the place'

Staff were quick to comment on the efforts taken by the company to make them feel valued – apart from the occasional 'well done' and 'thank you' the company has recognised that without the concerted efforts of all staff the performance of the business would indeed suffer – as one member of staff commented, (sarcastically), *'The MD is always checking up on what we do – its because he really cares - although it is fair to say that he is quick to recognise a 'job well done'.*

There are many examples of effective developmental activity at Maple Building Services Ltd and it is not the author's intent to list *'ad infinitum'* each and every piece of developmental activity evidenced during the review, (these are well understood by the company) – however a few examples are necessary to demonstrate the scope of developmental activity that has taken place over the recent past - examples included:

- Continuing refresher training by internal & external trainers on a wide range of practical courses.
- First Aid training for *all* staff
- CSCS Computer based Health & Safety training of all tradesmen

- IT Management training
- Tool Box Talks
- Driver training & refreshers
- Abrasive Wheels courses
- Continuing support for Modern Apprenticeships

One area, sadly neglected by many organisations is Induction – many companies commit significant resource to advertise for and select the right staff and fail to follow this up with a meaningful introduction into their organisations. It was pleasing to hear that staff were praiseworthy of the efforts taken by colleagues to give them a sound introduction into the company. The efforts taken by the Management Team to fully support this critical stage is clearly 'good practice' and a recent new starter was positive that this had helped him 'hit the ground running' much earlier than would have been the case had he been left to his own devices.

The overall view of the staff clearly indicated that developmental activity has been focussed and effective.

There has been a consistent approach taken by the company to ensure that meaningful developmental discussion, (based on outcomes), takes place at all levels – staff felt that this made them feel more valued and gave them an opportunity to discuss their aspirations and developmental needs openly with their peers.

Staff spoke about how they are encouraged to contribute their ideas at one-to-one's and also how they had a direct input into problem solving discussions, (proportionate to their role and responsibilities).

Certainly staff felt that in general the training they had received had benefited them as individuals and more importantly improved their performance, as one member of staff commented: *'The MD is committed to ensure that we all trained to the highest standards'*.

Overall, the company uses its available resources well and uses focused developmental activity in line with its planned priorities.

Principle Three – Evaluating the Impact on the Performance of the Organisation

COMMENTS IN RELATION TO

- The impact of learning and development on performance
- Continuous improvement of the approach to managing and developing people

Improvements in organisational performance do not come easily, but it is reasonable to assume that the significant increase in business activity achieved by the company over the past few years plus the confidence to further grow the business are mainly due to the combined efforts and expertise of all staff. The team are not complacent, and even though they share a wealth of expertise and experience they still recognise the need to update their knowledge on an on-going basis.

The impact of learning & development on overall business performance is further evidenced by:

- Significant Increase in Turnover with profitability maintained
- Low turnover of staff
- Being a finalist in the 2008 LABC East Anglia Region Built in Quality awards
- Retention of Key Clients
- Confidence to diversify into new markets

In general, staff perform more effectively in a supportive working environment and it was pleasing to obtain feedback from staff that clearly indicated that this was indeed the case at Maple Building Services.

Finally we should all ask ourselves the question - would we be as effective in our roles without the strong on-going developmental support that is available at Maple Building Services – I think the answer is a resounding no!.

‘Continuously improving the way we manage and develop our people’ is somewhat misleading as it indicates that unless changes are made you are unlikely to meet the standard – this is clearly not the case. If current working practices and methodologies that are in place are delivering the desired outcomes then there is clearly no need to change. The important point for companies to take on board is to ensure that developmental activity is effectively reviewed and actions taken to ensure that desired outcomes are met - the assessor has no doubt that this process is on-going and as such there are no issues to address.

6. Conclusion

Having conducted the assessment in accordance with Investors in People UK and The Assessment Network's guidelines, I am pleased to recommend to the Recognition Panel that Maple Building Services Ltd should be recognised as an Investor in People.

The assessor believes that the organisation has performed strongly against the requirements of the National Standard and is determined to further develop and improve its working practices through its on-going programme of continuous improvement.

7. Recognition Panel Feedback

The recognition panel confirmed the recommendation on the 30th September, 2008. The panel commented: *'We wish to congratulate the MD and his team on their success – the company understands the true benefits of learning & development and this will assist them as they plan to diversify into new markets'*.

8. Next Review

Recognition as an Investor in People is subject to reviews against the Investors in People Standard every three years. Therefore Maple Building Services Ltd will be required to be reviewed no later than 30th September, 2011, although, in the light of potential organisational change, it is entirely possible to be reviewed prior to this date.

For guidance in respect of future Investors in People review options please contact your local Investors in People Centre - The Assessment Network Ltd, on 01480 479 222.

9. Quality Assurance

The Assessment Network Ltd is responsible for the Quality Assurance of this assessment and will invite a representative from Maple Building Services Ltd to take part in a Quality Assurance Questionnaire. This questionnaire was devised and developed by Investors in People UK, with the objective of receiving client feedback in order to provide for a consistent approach to the assessment and recognition process. Further details will be forwarded by The Assessment Network Ltd in due course.

Allan Brown MIBC – September 2008

APPENDIX I

ASSESSMENT OUTCOMES MATRIX

STRATEGIES AND PLANS	Evidence Requirements Met (Y/N)	Evidence Requirements Not Met (List)
➤ The strategy for improving the performance of the organisation	Y*	
➤ The strategy for learning and development	Y	
➤ Strategies for managing people	Y	
➤ Strategies for leadership and management	Y	
TAKING ACTION		
➤ The effectiveness of managers	Y	
➤ Recognising and valuing people's contribution	Y	
➤ Involvement and ownership	Y	
➤ The effectiveness of learning and development	Y	
CONTINUOUS IMPROVEMENT		
➤ Performance improvement as a result of investment in people	Y*	
➤ Continually improving the way people are managed and developed	Y	

*Highlights key strengths

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APPENDIX II

ASSESSMENT PLAN

Assessor: Allan Brown	Date assessment plan submitted: 28/08/08
Project reference: 08/0930	Assessment type: New Standard Assessment
Client: Maple Building Services Ltd	On site date: 17 th September 2008 (1 day)
Size of organisation: 9	Scoping size: 9
Number of sites: 1* Number of sites in scope:1*	*Many staff however are working away on various projects – hence the need for telephone interviews

Scoping Rationale				
Job Role/Title	Number in scope	To be interviewed	Percentage	By exception note if p/time
Proprietor	1	1	100%	
Administration	1	1	100%	
Contracts Managers	2	2	100%	
Construction Manager	1	1	100%	
Technical & Design Manager	1	1	100%	
Tradesmen	3	3	100%	
Totals	9	9	100%	
Number of 1:1 interviews		3		
Number of group interviews		0		
Number of telephone interviews		6		
Additional client specific objectives (e.g. how the assessment will add value for the client.)		No specific additional objectives identified by client.		
Relevant / useful information for consideration. (e.g. change to organisation structure, new IIP Champion etc.)		Nothing significant		