



Organisation Improvement Framework

GLASGOW ASSOCIATION FOR MENTAL HEALTH

Glasgow

Review Report

Commercial in Confidence

UNDERTAKEN BY
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On behalf of Investors in People Scotland

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INTRODUCTION

The purpose of Glasgow Association for Mental Health is to promote the health and wellbeing of the people and the communities within Greater Glasgow. The vision is support the creation of a culture where all of Scotland's people will achieve full and equal citizenship rights, regardless of their mental health status. The services are delivered through a range of projects each managed by a Project Leader.

To achieve the purpose and vision the Association has a range of aims and values with measureable objectives for improving performance.

In addition to the support provided to service users the organisation has a strong commitment to developing its staff and volunteers not only in relation to improving job performance but also to give people a sound range of transferrable skills and knowledge to support their personal development.

The Association is headed by a Board of Directors with the Chief Executive having delegated responsibility for the overall management of the organisation.

There are challenges facing the Association. The economic situation has impacted on finances resulting in a need to reduce budgets. It has been found necessary to reduce the number of sites from five to three and this is now taking place. Efforts are being taken to minimise the need for redundancies and the Association's employment law advisors are providing advice and assistance on this. Self Directed Support with personalised budgets will provide service users with the opportunity to select their own service provider. There is a need to develop new business models to maintain the financial wellbeing of the Association. The Association must continue to be seen as a service provider of choice for services users, carers, partners and funders. There is a need to adjust manager's roles to suit the changing needs of the organisation and to equip all managers with effective leadership skills.

Glasgow Association for Mental Health has been recognised as an Investor in People since 2001 with successful reviews undertaken in 2004 and 2008.

OUTCOME

Having carried out the assessment process in accordance with the guidelines provided by the UK Commission for Employment and Skills, I was satisfied beyond any doubt that Glasgow Association for Mental Health continues to meet the requirements of the Investors in People Standard.

Accreditation Status

It was decided by senior management that this IIP Review should focus on the thirty-nine evidence requirements of the Investors in People Standard with a few additional ones relevant to the objectives of the Association taken from the Your Choices section of the IIP Framework added. As a result the status of the Association is Investor in People.

We have agreed that the continuous improvement meeting will focus the Association on future use of the IIP Framework to maximise the contribution to business performance.

PRIORITIES/OBJECTIVES

At the planning meeting we agreed the objectives for your Review should be:

- To receive confirmation that the Association continues to meet the evidence requirements of the Investors in People Standard with recognition continued.
- To receive guidance on how to make use of the Investors in People Framework for future business development.
- To identify how Investors in People can effectively support the key priorities that must be addressed to ensure the future success of Glasgow Association for Mental Health as detailed in the following Tables 1 and 2.

FINDINGS IN RELATION TO PRIORITIES / OBJECTIVES

To recruit and retain Board members with the right mix of skills and knowledge in relation to the Association's vision, values and overall aims.

I noted positive steps have been taken to ensure the Board have a balanced representation of service users and members with specialist knowledge to enable successful decisions to be made on the direction of the Association, its projects and services. A self analysis has been conducted and the outcome is a realisation of where the Board is short on specific skills and knowledge. Action is now being taken to find people who can fill the gaps.

Board members are provided with learning and development activities to help them make an effective contribution to the Association. There is an induction programme for new members and there are ongoing development sessions, for example, to raise awareness of the codes of practice, child protection and adult protection. Consideration is given to the limited availability members have and, in taking this into account, short development activities are incorporated into Board meetings.

It is recognised there can be difficulties in finding people with the level of specialist skills with possible competition with other organisations within the sector to attract suitable candidates. To this end there may be an opportunity for the Association to consider the where best to find suitable support and to positively promote the benefits of serving on the Board of Glasgow Association for Mental Health.

Board members, managers, staff and volunteers are engaged in business planning with effective consultation on changing priorities of the organisation.

The aims and objectives of the Association are, to a very large extent, driven by the service users while the requirements of funders and other stakeholders such as the Care Commission are required to be taken into account. Due to being service user driven there is a high level of engagement and consultation with the service users, managers, staff and volunteers on the objectives agreed in line with the overall purpose and vision of the Association.

Discussions with staff and volunteers confirmed the levels of engagement and consultation to be effective. Senior managers and a trade union representative confirmed there are constructive relationships with the representatives involved in business planning. Formal discussions take place through a Joint Negotiating Committee, Health and Safety Committee and other joint meetings. Two nominated Board members have responsibilities for meeting regularly with the representatives and there are also informal discussions with senior management as and when required.

In talking to managers and staff I identified the range of opportunities there are to involve staff in sharing ideas and in decision making to improve performance. References were made to various forums that engage service users and staff in considering improvements to services, all staff meetings, team and project meetings and, on an individual basis, appraisal and supervision discussions.

I found through discussions with staff and volunteers there is a clear understanding of the Association purpose vision and key aims and of team and project objectives. People were able to describe how they make a positive contribution to the aims and objectives of their team and examples included – *“our aim is to help all service users to have an equal opportunity and to promote recovery and wellbeing”* – *“we have objectives for supporting people in the community in getting the right benefits and arranging activities after referral”* – *“our objectives are to support service users through developing a work ethic”* – *“my role is to support homeless people who have mental health problems”*.

There were consistent references by staff and volunteers to being encouraged to contribute ideas for improving personal performance through appraisal and supervision discussions

and to encourage others to improve through sharing ideas, knowledge and skills at team and project meetings or forums – *“we are generally encouraged to put in ideas for improvement at team meetings”*. Managers encouraging people to be involved in decision making to improve performance was consistently referred to and it was clear from discussions people feel this to be motivational – *“at the last staff meeting we were asked to consider ways of reducing costs”* – *“we have two or three meetings a year when we get together and decide what we are going to do”* – *“We are encouraged to speak up and share ideas”* – *“we have quite a free role”* – *“we are always talking about how to improve the service we provide, it is very much a team approach”* - *“at our team meetings we look at the activities we can provide in relation to what users want”* – *“at appraisals we agree personal targets”*.

Overall I found a high level of satisfaction with the levels of communication and engagement - *“I am well impressed at how they keep us informed, the Chief Executive is an excellent Director”*

To continue to develop an effective management and leadership style that is in line with the demands for change.

Senior management have developed a management style that is open, approachable and supportive with a strong emphasis on teamwork and having a partnership approach. Managers are expected to give direction, empower, support and help staff meet their learning and development needs in relation to their jobs and also to provide them with opportunities to develop transferrable skills. I noted there is an increased focus on informal coaching and this is particularly evident in supervisions where the discussions have become more personalised. The management style has resulted in a very consistent view that managers are effective in the ways they lead, manage and develop their teams. There is a high level of trust in senior management through them being seen to have an open and honest approach and people feel inspired by them. One person stated – *“we are passionate about what we do for service users but that comes from the passion demonstrated from the top”*. Positive comments were made about the Chief Executive personally delivering learning and development programmes and with regard to senior management commitment to learning and development being demonstrated as a result of them attending programmes along with staff. Senior management are also seen to work effectively as a team through developing a partnership approach and one that people refer to as - *“we all work together as equals”*.

In referring to the capabilities and effectively applying them managers and leaders referred to keeping people within their teams informed and ensuring they know how their activities fit with their project and the Association, discussing personal performance and providing feedback, providing support required, agreeing learning and development needs at supervision and appraisal discussions and taking a coaching role.

“I pass information to all and make sure the team understand the project” – “we have regular discussions on performance within our group” – “we have ongoing dialogue through team meetings, supervisions and appraisals” - “discussions at appraisals and supervisions are two way, I also learn from our discussions, we have some very experienced people” - “we are doing a lot of coaching, it is part of the PDA programme but we were doing it anyway”.

Managers and leaders also referred to their actions to provide people with regular constructive feedback on their performance and to recognise the contributions of people. There were consistent references to the annual appraisal discussions where – *“we agree personal objectives related to those of the team”* – and to the more frequent supervision discussions – *“the supervisions are more personal, we provide feedback related to personal workloads and encourage people to discuss issues or problems whether or not they are work related”*. References to recognition of contributions included – *“I ensure people understand the value of what they bring to the team”* – and – *“contributions are recognised through the supervisions, it is the most formal way”*.

Staff were very consistent in their views that managers are effective in leading, managing and developing them. Comments included – *“all managers are really nice”* – *“managers are very fair and supportive, they are always willing to help”* – *“managers coach and support you”* – *“we do have regular appraisal and supervision discussions when we get feedback on our performance”*. With regard to recognising good performance the following comments were made - *“managers do appreciate what you do”* – *“managers will say well done through appraisals and supervisions, you get a lot of praise”* – *“managers are very quick to say if you have done a good job”*.

Managers involved in the PDA Leadership and Management Programme for Care Services spoke highly of the programme and the value of it in developing good leadership skills, understanding different leadership styles and also for refreshing knowledge and skills already possessed

While there is a review of the leadership and management capabilities in line with the delivery of the leadership and management programme there may be an opportunity to broaden this out to consider how the leadership style and approach may be affected by the ongoing changes affecting the Association.

To ensure sector and cultural values govern how the Glasgow Association for Mental Health operates and are effectively applied throughout the Association.

While the Association is values driven and is considered by all to have values they tend to be implicit at the present time and this presents the opportunity to make them more explicit.

When asked about the values most people referred to the key aims / activities of the Association rather than the actual values. This presents the opportunity to make the values more visible and to demonstrate what they mean with regard to how managers lead and manage their teams and to consider how the values are incorporated into the work people do. This is more an awareness raising issue to make people aware of the values that do exist and how they are embedded within the Association.

To devise educational programmes and other learning and development opportunities that develop knowledge, skills and overall understanding of mental health, wellbeing and other related issues.

There is a well structured approach to meeting the learning and development needs of the Association and its projects. Mandatory learning and development programmes and needs identified to meet Association and project aims and objectives are taken into account and collated into a plan by the Learning and Development team. Overall needs are very much focused on service delivery with outcomes that relate to enhanced Association and project performance and the impact on the support provided to service users. Training Co-ordinators prepare a GAMH Learning and Development Calendar that is used by managers, staff and volunteers to plan and meet team and individual needs.

Discussions with senior managers, managers and project leaders highlighted the range of activities identified to meet the needs of the Association and projects. They include leadership and management development, equalities, adult protection, child protection, understanding mental health, first aid and mental health first aid.

Throughout discussions there were consistent references to people agreeing their learning needs and how they will be met at appraisal and supervision discussions. There were also references to being able to ask to attend programmes at any time and it is felt the GAMH Learning and Development Calendar has proved to be beneficial in helping people to plan and meet needs.

There is a mix of externally and internally delivered programmes as well as educational qualifications. Less formal development takes place through informal coaching and support by managers and through secondments to other projects. There are team development sessions, for example, the Young Carers Project has team development days when the focus is on developing needs to improve the delivery of the service to young people being supported by the project.

Managers and Project Leaders referred to the impact of learning and development on project and Association performance. The Equalities programme ensures all staff have awareness of the how legal framework for equality links to recovery and of the issues impacting on

equalities, mental health and social care. The Adult Protection Programme is a mandatory programme delivered to ensure staff are aware of the legal aspects of the protection of adults who may be at risk of harm. Codes & Standards is delivered to ensure staff are aware of good practices relating to codes of practice.

Staff and volunteers referred their individual development and how the learning from activities they had undertaken had impacted on their own performance and that of their team or project and ultimately the Association. Examples included - *“I attended an Introduction to Mindfulness and I am now better able to control my stress and I can help service users to calm down”* – *“I have attended a Voluntary Organisation Finance Management programme and it has confirmed we do things properly”* – *“Personal safety training has provided guidance on how to look after myself”* – *“as a result of benefits training I can accurately advise service users on their needs and how to appeal”* – *“I have completed an SVQ Level 3 in Social Care and have also attended mandatory programmes including Protection of Vulnerable Adults and Assist (suicide intervention).*

Discussions with new staff and volunteers confirmed there is a very effective induction programme to support them in taking up their duties effectively. Staff undertake a six month formal Social Care Association Customised Induction Award ‘Preparing for Practice’ – *“the Preparing for Practice programme gave me a very good idea of social work and the job I do.* Volunteers undertake a phased in-house induction programme to support their development into their roles.

Board members and senior management regularly monitor the overall investment in meeting the learning and development of people and how it impacts on the delivery of the services. Evaluation of the investment is used to develop strategies for improving performance and, at the time of this IIP Review visit, ongoing evaluation of the leadership and management programme is taking place with a view to shaping the leadership and management style for the future. Senior management referred to the actions taken to measure the impact of learning and development. They include service user feedback, feedback from the Care Commission, staff feedback and immediate evaluation from those attending activities.

There is an equal opportunities policy that with strategies that ensure people have equal access to support and to meet their learning and development needs. Discussions with managers and staff confirmed all have an equal opportunity through appraisal and supervision discussions, all people receiving the mandatory training, people being provided with learning and development activities related to their projects and jobs and to all being encouraged by managers to undertake development activities – *“we receive the training we need for our job”* – *“needs are discussed with us at supervisions”* – *“there are no barriers”.*

To develop a culture of continuous improvement.

I found continuous improvement to be at the heart of the Association with ongoing engagement with service users to seek ways of improving service delivery and the range and quality of activities delivered. Senior management also regularly review people management and development practices with a view to making improvements and this has resulted in a greater structure to learning and development with volunteers now having greater access to activities, an enhanced induction for new employees and also for volunteers and ongoing engagement with people with greater use of service user and staff forums.

Discussions with managers and leaders confirmed the actions taken by them to improve performance - *“we encourage people to be as innovative and creative as possible”* - *“supervisions have changed now, they are now much more focused on you as an individual”*

People also provided examples of improvements made and feel motivated as a result of improvements - *“we cherish the opportunity to be innovative”* - *“opportunities for training have definitely improved there are more opportunities and a better structure”* – *“the supervision discussions are now much more personal”*.

ADDITIONAL STRENGTHS AND AREAS OF GOOD PRACTICE

During the discussions I found many strengths and good practices within Glasgow Association for Mental Health including the following:

There is a very high respect for managers at all levels with many commenting positively on the effectiveness and approachability of senior management who are viewed as inspirational leaders.

People are strongly committed to the success of their project and GAMH.

Services are very focused on the needs of users with a high level of consultation with the users to identify their needs and expectations.

There is a high level of empowerment with people taking ownership and responsibility for making changes to improve performance.

All people confirmed they have regular supervision and appraisal discussions with particular mention of the value of supervisions in helping them when they have particular problems whether of a work or personal nature.

The commitment to learning and development is reinforced through the Chief Executive personally delivering programmes and managers attending programmes with staff. Also in encouraging people to develop transferrable skills

Preparation for Practice provides a very thorough and valuable induction for people new to

the Association and to working within social services.

Lived Experience Trainers talk of their own personal experience of mental illness and problems faced by those who suffer. This results in the delivery of their sessions having greater impact and also supports the trainers in their own personal development.

CONTINUOUS IMPROVEMENT ACTIONS

The following suggestions are made to support you in achieving continuous improvement and in meeting the challenges impacting on the Association.

Board members, managers, staff and volunteers are engaged in business planning with effective consultation on changing priorities of the organisation.

There may be an opportunity to review procedures for the recruitment of Board members with specific skills taking into account the most appropriate 'target markets', for example, large organisations that encourage staff to support other organisations within communities as part of their commitment to social responsibility. It may also prove beneficial to promote the positive aspects of supporting the Association including the vision, values and key aims and also the benefits people could expect through serving as a Board member for GAMH.

While the immediate priority is the restructure of the Association there is an opportunity to communicate the vision and aims beyond the changes. This will keep a positive focus on the long term future of the Association and where people may fit within the structure. It will create a positive message and help to minimise uncertainties and concerns about the future. There is an opportunity to remind people of the outputs to be achieved by their projects and performance against them. This will further enhance the understanding of the impact they have on the successful performance of the project and Association.

There is an opportunity to tease the values out of the GAMH aims / activities. While the overall view is that the association is a values driven organisation the understanding of the actual values. A focus on clear values would ensure people are aware of how they contribute to them and would also clearly demonstrate to all stakeholders what they can expect from the Association. Clarifying the values will also strengthen the Association's reputation as a service provider of choice when self directed support and personalised budgets comes into being.

To further strengthen the focus on the values you may find it if benefit to focus on them during appraisal discussions.

To continue to develop an effective management and leadership style that is in line with the demands for change.

There is an opportunity to broaden out the review of the management capabilities for leading, managing and developing people to ensure they continue to fit with the vision and values and ongoing change.

Discussions highlighted that managers at all levels are more of a coaching role in supporting staff. You may wish to consider a more formal approach to managers taking a coaching role. This would strengthen the leadership role and the overall focus continuous improvement.

There is an opportunity to incorporate the capabilities into manager's appraisals and to provide managers with constructive feedback on their performance in relation to them.

To devise educational programmes and other learning and development opportunities that develop knowledge, skills and overall understanding of mental health, wellbeing and other related issues.

You may wish to consider a more formal approach to measuring the impact of learning and development on individual and Association performance. This may be achieved through ongoing discussion and monitoring the changes resulting from people undertaking activities. The outcome would be ongoing assurance that the return on investment in learning and development is maximised with clear performance improvements resulting from the actions.

NEXT STEPS

Once you have received this report I will return on an agreed date to discuss the findings with you in more detail and to consider how you wish to address the improvement areas and use the Investors in People Framework to your best advantage. We will also consider the potential benefits of other Investors in People services available to you.

Name: Raymond Boland
Investors in People Specialist
Investors in People Scotland

Date: 3rd June 2011.

Appendix 1 - Key

✓	Areas of strength and meeting the requirements of the Standard
D	Met but with development areas
D	Not yet met but good practice is developing
X	Areas for development and not meeting the requirements of the Standard
n/a	Evidence not considered at this visit

The Framework

01	Business Strategy <i>A strategy for improving the performance of the organisation is clearly defined and understood.</i>		
	The Standard		
Your Choice	1	Top managers make sure the organisation has a clear purpose and vision supported by a strategy for improving its performance	✓
	2	Top managers make sure the organisation has a business plan with measurable performance objectives	D
	3	Top managers make sure there are constructive relationships with representative groups (where they exist) and the groups are consulted when developing the organisation's business plan	✓
	4	Managers can describe how they involve people when developing the organisations business plan and when agreeing team and individual objectives	✓
	5	People who are members of representative groups can confirm that top managers make sure there are constructive relationships with the groups and they are consulted when developing the organisation's business plan	✓
	6	People can explain the objectives of their team and the organisation at a level that is appropriate to their role, and can describe how they are expected to contribute to developing and achieving them	D
	7	Top managers make sure the organisation has a clear set of core values that support its purpose and vision	D
	8	Top managers make sure the organisation's strategy is developed through the involvement of managers, people, stakeholders and other sources	n/a
	9	Top managers make sure the organisation has key performance indicators to improve its performance	n/a

01

Business Strategy (Continued)

A strategy for improving the performance of the organisation is clearly defined and understood.

Your Choice		
10	Top managers can describe how social responsibilities are taken into account in the organisation's strategy	n/a
11	Top managers make sure the core values are at the heart of the organisation's strategy and govern the way it operates	D
12	Top managers can describe how social responsibility is part of the culture of the organisation	n/a
13	Managers can describe the organisation's core values and what this means to the way they are expected to manage	D
14	Managers can describe how they are involved in developing the organisation's strategy	n/a
15	Managers can describe the key performance indicators they use to improve the organisation's performance	n/a
16	Managers can describe the organisation's social responsibilities and what this means to the way they are expected to manage	n/a
17	Managers can describe how they make sure the core values are at the heart of the way the organisation operates	D
18	Managers can describe how they make sure social responsibility is part of the culture of the organisation	n/a
19	People can describe the organisation's core values and what this means to the way they are expected to work	D

01	Business Strategy (Continued) <i>A strategy for improving the performance of the organisation is clearly defined and understood.</i>		
	Your Choice		
	20	People can describe how they are involved in developing the organisation's strategy	n/a
	21	People can describe the key performance indicators used by the organisation to improve its performance	n/a
	22	People can describe the organisation's social responsibilities and what this means to the way they are expected to work	n/a
	23	People believe the core values are at the heart of the way the organisation operates	D
	24	People believe in and share the organisation's vision and values	D
	25	People believe that social responsibility is part of the culture of the organisation	n/a
Plan: Develop strategies to improve performance			

02

Learning & Development Strategy

Learning and development is planned to achieve the organisation's objectives.

The Standard	1	Top managers can explain the organisation's learning and development needs, the plans and resources in place to meet them, how these link to achieving specific objectives and how the impact will be evaluated	✓
	2	Managers can explain team learning and development needs, the activities planned to meet them, how these link to achieving specific team objectives and how the impact will be evaluated	✓
	3	People can describe how they are involved in identifying their learning and development needs and the activities planned to meet them	✓
	4	People can explain what their learning and development activities should achieve for them, their team and the organisation	✓
Your Choice	5	Top managers can describe the learning and development strategy they have in place to build the organisation's capability to achieve its vision	n/a
	6	Top managers can describe how innovative and flexible ways of developing people are identified through internal and external sources, and how these are included in the organisation's learning and development strategy	n/a
	7	Top managers can describe how they have created a culture that encourages continuous learning and promotes the development of skills and knowledge at every level	n/a
	8	Managers can describe the plans they have in place to build their team's capability to contribute to achieving the organisation's vision	n/a
	9	Managers can describe how they involve people in identifying the learning and development needs of their team and the activities planned to meet them	n/a
	10	Managers can describe how they take account of people's different learning styles when planning learning and development	n/a

02

Learning & Development Strategy (Continued)

Learning and development is planned to achieve the organisation's objectives.

Your Choice	11	Managers can describe how they act as a role model for continuous learning	n/a
	12	People can confirm that their learning and development is planned to build their future capability to contribute to achieving the organisation's vision	n/a
	13	People can describe how they are involved in identifying the learning and development needs of their team and the activities planned to meet them	n/a
	14	People can describe what team learning and development activities should achieve for the team and the organisation	n/a
	15	People can confirm that learning and development takes account of their preferred learning style	n/a
	16	People believe they have a responsibility for their own learning and development	n/a
	17	People believe that continuous learning is at the heart of the culture of the organisation	n/a

Plan: Develop strategies to improve performance

03

People Management Strategy

Strategies for managing people are designed to promote equality of opportunity in the development of the organisation's people.

The Standard	1	Top managers can describe strategies they have in place to create an environment where everyone is encouraged to contribute ideas to improve their own and other people's performance	✓
	2	Top managers recognise the different needs of people and can describe strategies they have in place to make sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for people to learn and develop which will improve the performance	✓
	3	Managers recognise the different needs of people and can describe how they make sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for people to learn and develop which will improve their performance	✓
	4	People believe managers are genuinely committed to making sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for them to learn and develop which will improve their performance	✓
	5	People can give examples of how they have been encouraged to contribute ideas to improve their own and other people's performance	✓
Your Choice	6	Top managers can describe strategies they have in place to make sure recruitment and selection meets the needs of the organisation and is fair, efficient and effective	n/a
	7	Top managers can describe strategies they have in place to promote equality and manage diversity in the workplace	n/a
	8	Top managers can describe strategies they have in place to support work-life balance to meet the needs of the organisation and its people	n/a
	9	Top managers can describe how they have created an environment where giving and receiving constructive feedback is valued	n/a
	10	Top managers can describe how the organisation's structure is designed to achieve its strategy and make the most of people's talents	n/a

03

People Management Strategy (Continued)

Strategies for managing people are designed to promote equality of opportunity in the development of the organisation's people.

Your Choice

11	Top managers can describe how the organisation's recruitment and selection strategies are linked to its business strategy and are designed to make sure there is a talented and diverse workforce that is able to achieve the organisation's vision	n/a
12	Top managers can describe how the organisation's equality and diversity strategies are linked to its business strategy and applied throughout the organisation	n/a
13	Top managers can describe how the organisation's work-life balance strategies are linked to its business strategy and applied throughout the organisation	n/a
14	Managers can describe how they make sure recruitment and selection is fair, efficient and effective	n/a
15	Managers can describe how they value people's differences and how they are effective in promoting equality and managing diversity in the workplace	n/a
16	Managers can describe how they make sure work-life balance solutions are effective put into practice	n/a
17	Managers can describe how they encourage people to give and receive constructive feedback	n/a
18	Managers can describe how they make sure people are given the opportunity to make the most of their talents within the organisation	n/a
19	Managers can describe how they play an important role in recruiting and selecting people with values that match the organisation's values	n/a
20	Managers can describe how they value diversity and create an environment where people can use their unique talents and achieve their potential	n/a

03

People Management Strategy (Continued)

Strategies for managing people are designed to promote equality of opportunity in the development of the organisation's people.

Your Choice

21	Managers can describe how they value the work-life balance strategies and apply them creatively to benefit individuals, teams and the organisation	n/a
22	People believe recruitment and selection is fair	n/a
23	People believe managers value people's differences and can give examples of how they promote equality and manage diversity in the workplace	n/a
24	People can describe how they are supported in balancing their work and personal lives	n/a
25	People can describe how they give and receive constructive feedback to improve performance	n/a
26	People believe they are given the opportunity to make the most of their talents within the organisation	n/a
27	People can describe how their views are taken into account when recruiting and selecting team members	n/a
28	People believe everyone in the organisation values diversity	n/a
29	People believe work-life balance is valued and part of the culture of the organisation	n/a


Plan: Develop strategies to improve performance

04		Leadership & Management Strategy <i>The capabilities managers need to lead, manage and develop people effectively are clearly defined and understood.</i>	
The Standard	1	Top managers can describe the knowledge, skills and behaviours managers need to lead, manage and develop people effectively and the plans they have in place to make sure managers have these capabilities	D
	2	Managers can describe the knowledge, skills and behaviours they need to lead, manage and develop people effectively.	D
	3	People can describe what their manager should be doing to lead, manage and develop them effectively	D
Your Choice	4	Top managers can describe how they define the current and future capabilities managers need in line with the organisation's purpose, vision and values	n/a
	5	Top managers make sure managers are regularly reviewed against the capabilities and receive constructive feedback on their performance	D
	6	Top managers make sure managers are provided with the help they need to develop the capabilities	✓
	7	Top managers can describe how the organisation's leadership and management strategy is linked to its business strategy and takes account of external good practice	n/a
	8	Top managers can describe how they create an environment where everyone is encouraged to develop leadership capabilities	n/a
	9	Managers can describe how they are involved in defining the current and future capabilities all managers need	n/a
	10	Managers can confirm that they are regularly reviewed against the capabilities and receive constructive feedback on their performance	D

04

Leadership & Management Strategy (Continued)

The capabilities managers need to lead, manage and develop people effectively are clearly defined and understood.

Your Choice	11	Managers can confirm that they are provided with the help they need to develop the capabilities	
	12	Managers can describe how they encourage everyone to develop leadership capabilities	n/a
	13	People can give examples of how they have been encouraged to develop leadership capabilities	n/a

Plan: Develop strategies to improve performance

05	Management Effectiveness <i>Managers are effective in leading, managing and developing people.</i>			
	The Standard	1	Managers can explain how they are effective in leading, managing and developing people	✓
		2	Managers can give examples of how they give people constructive feedback on their performance regularly and when appropriate	✓
		3	People can explain how their managers are effective in leading, managing and developing them	✓
		4	People can give examples of how they receive constructive feedback on their performance regularly and when appropriate	✓
Your Choice		5	Top managers can describe how they act as role models when demonstrating leadership and management capabilities in line with the organisation's values	D
		6	Top managers can describe how they act as role models when working as a team and sharing knowledge	✓
		7	Top managers can describe how they act as role models for inspirational leadership and have an open, honest and trusting management style	✓
		8	Top managers can describe how they have made coaching part of the organisation's culture	n/a
		9	Managers can describe how they lead, manage and develop people in line with the organisation's values	n/a
		10	Managers can describe how they encourage people to work together and share knowledge within and across teams	n/a

05

Management Effectiveness (Continued)*Managers are effective in leading, managing and developing people.***Your Choice**

11	Managers can describe how they make sure people receive information, advice and guidance to help them plan and develop their career	n/a
12	Managers can describe how they use coaching skills to help people achieve their potential	n/a
13	Managers can describe how they act on feedback from all levels in the organisation to improve the way they lead, manage and develop people	n/a
14	Managers can describe how top managers inspire them to lead, manage and develop people effectively	n/a
15	Managers can give examples of how they themselves act as inspirational leaders	n/a
16	People can describe how their manager leads, manages and develops them in line with the organisation's values	n/a
17	People can describe how they work together and share knowledge within and across teams	n/a
18	People can confirm that they receive information, advice and guidance to help them plan and develop their career	n/a
19	People can describe how their managers use coaching skills to help them achieve their potential	n/a
20	People can confirm that they are able to give constructive feedback to their manager, and believe it is well received and acted on	n/a

05	Management Effectiveness (Continued) <i>Managers are effective in leading, managing and developing people.</i>		
	Your Choice		
	21	People can confirm that they respect and trust their managers	n/a
	22	People can confirm that they have confidence in the leadership and management capabilities of top managers	n/a
	23	People can describe how managers inspire and motivate them to achieve their full potential	n/a
	24	People believe the organisation has a culture of openness and trust	n/a
	25	People believe that coaching is part of the organisation's culture	n/a
Do: Take action to improve performance			

06	Recognition & Reward <i>People's contribution to the organisation is recognised and valued.</i>			
	The Standard	1	Managers can give examples of how they recognise and value people's individual contribution to the organisation	✓
		2	People can describe how they contribute to the organisation and believe they make a positive difference to its performance	✓
		3	People can describe how their contribution to the organisation is recognised and valued	✓
Your Choice		4	Top managers make sure the organisation has a clear and fair reward and recognition strategy which is used to motivate people to improve the organisation's performance	n/a
		5	Top managers can describe how they involve representative groups (where they exist) in developing the organisation's reward and recognition strategy	n/a
		6	Top managers can describe how the organisation's reward and recognition strategy is linked to its business strategy and externally benchmarked	n/a
		7	Top managers make sure the organisation has a forward-thinking benefits strategy with policies that go beyond legal requirements	n/a
		8	Managers can describe how they are involved in developing the organisation's reward and recognition strategy	n/a
		9	Managers can describe how they apply the organisation's reward and recognition strategy fairly	n/a
		10	Managers understand what motivates their people and take account of this when recognising and rewarding them	n/a

06

Recognition & Reward (Continued)*People's contribution to the organisation is recognised and valued.***Your Choice**

11	Managers can describe how they reward and celebrate individual and team successes and achievements	n/a
12	Managers can describe how they involve people in developing the organisation's reward and recognition strategy	n/a
13	Managers can describe how they encourage people to recognise the contribution their colleagues make to the organisation	n/a
14	People who are members of representative groups can confirm that the groups are involved in developing the organisation's reward and recognition strategy	n/a
15	People can describe the organisation's reward and recognition strategy and what they need to do to be valued, recognised and rewarded	n/a
16	People believe the organisation's reward and recognition strategy is fair and can give examples of how they are motivated by it	n/a
17	People can describe how individual and team successes and achievements are rewarded and celebrated	n/a
18	People can describe how they are involved in developing the organisation's reward and recognition strategy	n/a
19	People can describe how they recognise the contribution their colleagues make to the organisation	n/a

Do: Take action to improve performance

07	Involvement & Empowerment <i>People are encouraged to take ownership and responsibility by being involved in decision-making.</i>		
	The Standard		
	1	Managers can describe how they promote a sense of ownership and responsibility by encouraging people to be involved in decision-making, both individually and through representative groups, where they exist	✓
	2	People can describe how they are encouraged to be involved in decision-making that affects the performance of individuals, teams and the organisation, at a level that is appropriate to their role	✓
	3	People can describe how they are encouraged to take ownership and responsibility for decisions that affect the performance of individuals, teams and the organisation, at a level that is appropriate to their role	✓
Your Choice	4	Top managers can describe the consultation arrangements they have in place to encourage people to take part in decision-making at both an individual and a representative level	n/a
	5	Top managers make sure the organisation has effective internal communication systems to encourage knowledge and information to be shared throughout the organisation	n/a
	6	Top managers can describe how consultation and involvement is part of the organisation's culture	n/a
	7	Top managers can describe how they involve people in designing consultation arrangements	n/a
	8	Top managers can describe how they have created a culture where people aim for continuous improvement	n/a
	9	Managers can describe how they make sure people receive the support they need to make decisions that affect the performance of individuals, teams and the organisation, at a level that is appropriate to their role	n/a
	10	Managers can describe how they encourage knowledge and information to be shared throughout the organisation	n/a

07

Involvement & Empowerment (Continued)

People are encouraged to take ownership and responsibility by being involved in decision-making.

Your Choice

11	Managers can give examples of how they have created an environment where people aim for continuous improvement and openly challenge the way the organisation works to improve performance	n/a
12	People can give examples of how they take ownership for decisions that affect the performance of individuals, teams and the organisation, at a level that is appropriate to their role	n/a
13	People believe that the consultation arrangements are effective and allow them to take part in decision-making	n/a
14	People can confirm that they have access to the knowledge and information and receive the support they need to make decisions and improve performance	n/a
15	People believe their managers trust them to make decisions that improve performance	n/a
16	People can confirm that they are committed to the success of the organisation	n/a
17	People can confirm that they are involved in designing consultation arrangements	n/a
18	People believe they can challenge the way the organisation works to improve performance and can give examples of how they or others have done so	n/a
19	People can describe what gives them sense of ownership and pride in working for the organisation	n/a

Do: Take action to improve performance

08	Learning & Development <i>People learn and develop effectively.</i>			
	The Standard	1	Managers can describe how they make sure people's learning and development needs are met	✓
		2	People can describe how their learning and development needs have been met, what they have learnt and how they have applied this in their role	✓
		3	People who are new to the organisation, and those new to a role, can describe how their induction has helped them to perform effectively	✓
Your Choice		4	Top managers make sure the organisation makes effective use of internal and external resources for learning and development	n/a
		5	Top managers can describe how the organisation is flexible in the way it develops people, using innovative and cost-effective solutions that meet learning and development needs	n/a
		6	Top managers can describe how they have created a culture where all learning is valued	n/a
		7	Top managers can describe how they make sure mentoring opportunities are available	n/a
		8	Managers can describe how they make sure knowledge and learning is shared across the organisation	n/a
		9	Managers can describe how they provide learning and development opportunities for people to achieve their full potential for mutual benefit	n/a
		10	Managers can describe how they recognise and celebrate learning and development achievements	n/a

08

Learning & Development (Continued)*People learn and develop effectively.***Your Choice**

11	Managers can describe how they make sure learning and development is an everyday activity	n/a
12	Managers can describe how they support people in their personal development activities and encourage them to broaden their knowledge and skills through learning	n/a
13	People can confirm that knowledge and learning is shared across the organisation	n/a
14	People can describe how they are encouraged to try new approaches and learn from their efforts, mistakes and successes	n/a
15	People can confirm that they are motivated to learn and enjoy putting their learning into practice	n/a
16	People can confirm that they are well supported after learning and development activities, and have clear objectives for putting the new skills and knowledge into practice	n/a
17	People can describe how learning and development achievements are recognised and celebrated	n/a
18	People can confirm that learning and development is an everyday activity	n/a
19	People can describe how they are supported in their personal development activities	n/a
20	People can confirm that mentoring opportunities are available	n/a

Do: Take action to improve performance

09	Performance Measurement		
	<i>Investment in people improves the performance of the organisation.</i>		
The Standard	1	Top managers can describe the organisation's overall investment of time, money and resources in learning and development	✓
	2	Top managers can explain, and quantify where appropriate, how learning and development has improved the performance of the organisation	✓
	3	Top managers can describe how the evaluation of their investment in people is used to develop their strategy for improving the performance of the organisation	✓
	4	Managers can give examples of how learning and development has improved the performance of their team and the organisation	✓
	5	People can give examples of how learning and development has improved their performance, the performance of their team and that of the organisation	✓
Your Choice	6	Top managers can describe how the organisation measures and evaluates how its strategies for managing people contribute to the organisation's performance	n/a
	7	Top managers can describe the impact of their investment in people on achieving key performance indicators	n/a
	8	Top managers make sure the organisation has a flexible and effective approach to measuring and reporting the return on investment on its people strategies	n/a
	9	Top managers make sure that the return on investment on its people strategies is reported clearly to all stakeholders	n/a
	10	Managers can describe how they are involved in measuring and evaluating how the organisation's people strategies contribute to its performance	n/a

09	Performance Measurement (Continued)		
	<i>Investment in people improves the performance of the organisation.</i>		
Your Choice	11	Managers can give examples of improvements in the performance of individuals, their team and the organisation as a result of people management activities	n/a
	12	People can describe how their career prospects have improved as a result of their learning and development and the way they have been managed	n/a
	13	People can give examples of improvements in the performance of the team as a result of people management and development activities	n/a
	14	People can describe how the organisation's investment in people has improved its performance	n/a
Review: Evaluate and improve performance			

10	Continuous Improvement <i>Improvements and continually made to the way people are managed and developed.</i>		
	The Standard		
	1	Top managers can give examples of how the evaluation of their investment in people has resulted in improvements in the organisation's strategy for managing and developing people	✓
	2	Managers can give examples of improvements they have made to the way they manage and develop people	✓
	3	People can give examples of improvements that have been made to the way the organisation manages and develops its people	✓
Your Choice	4	Top managers can describe how the organisation has used self-review techniques to improve its strategies for managing and developing people.	n/a
	5	Top managers can describe how the organisation has used information from external reviews, including previous Investors in People assessment or review, to improve strategies for managing and developing people	n/a
	6	Top managers make sure effective feedback methods are used to understand people's needs and expectations and to highlight improvements needed to the way they are managed and developed	n/a
	7	Top managers can describe the range of measures used to monitor and understand people's view of how they are managed and developed	n/a
	8	Top managers can describe how the organisation has used Internal and external benchmarking to review and improve its strategies for managing and developing people	n/a
	9	Top managers can demonstrate an improvement in people's views of how they are managed and developed	n/a
	10	Managers can describe how they review and evaluate people management and development and use this learning to shape future activity	n/a

10	Continuous Improvement (Continued) <i>Improvements and continually made to the way people are managed and developed.</i>		
	Your Choice		
	11	Managers can describe how they involve people in identifying improvements to the way they are managed and developed	n/a
	12	People can give examples of how they are involved in identifying improvements to the way they are managed and developed	n/a
	13	People believe that managers are genuinely committed to improving the way they manage and develop them	n/a
	14	People can describe improvements that have been made, as a result of their feedback, to the way the organisation manages and develops people	n/a
	15	People believe that the organisation is a great place to work as a result of ongoing improvements made to the way they are managed and developed	n/a
Review: Evaluate and improve performance			