INVESTORS IN PEOPLE ASSESSMENT REPORT
PERPETUITY RESEARCH & CONSULTANCY INTERNATIONAL

Key Information

Assessment Type	Assessment
Investors in People Specialist Name	Allan Churchman
Visit Date	4th November 2014
Assessment Enquiry Number	ENQ – 94524 – NRJGP5

Conclusion

Having conducted the assessment in accordance with Investors in People and Investors in People Central England's guidelines, I am pleased to confirm Perpetuity Research & Consultancy International meets the requirements of the Investors in People Standard.

The Mandatory 18-month Interaction

All organisations that have met the requirements of the Investors in People standard are now required to undertake an Interaction with their Specialist within 18-months of the formal accreditation date, therefore establishing an interim interaction, which will add value to the continued use of the framework as an organisational improvement tool.

The scale of the activity can range from:

- Participation in a network or learning forum
- Bespoke intervention, training or discussion
- A discussion with senior managers(s) on progress against current people management strategy
- A review of the recommendations/action plan identified following the last assessment

Allan Churchman, your specialist has established your requirements are individual and therefore will make contact with you to discuss your needs nearer the time this is required to take place. You are also welcome to create intervals of interaction to suit your business needs and therefore establish continued contact with Allan to help and support your business needs related to people management practice.

Milestone Dates

Review of Continuous Improvement Plan	November 2017
Date of Next Full Assessment	May 2016

Specialist Name: *Allan Churchman*
Investors in People Specialist

Introduction to the Perpetuity Research & Consultancy International assessment

Perpetuity Research has undergone significant change over the past three years. The changes have seen the business move to a new geographical area resulting in staff changes at all levels. Through the assessment it become very clear the fundamental principles of Investors in People have not been lost during these changes. In fact the opposite is true; people practices of inclusion, engagement, development, trust and empowerment have been adopted as a business development tool and embedded into the culture of the business.

Assessment and Client Objectives

The purpose of the assessment is:

To establish whether Perpetuity Research & Consultancy International continues to meet the core evidence requirements of the Standard, with a report format agreed by strengths and potential areas for development

- To identify good practice and make recommendations for future development

Assessment Methodology

A sample size of 6 people was chosen for interview. The majority of interviews conducted on a one to one basis. Representatives contributed to the assessment through both formal and informal conversations.

The following methods were used to gather evidence:

- One-to-one interviews
- Pair interviews
- Observation of paper evidence
- Informal discussions whilst on site

Strengths of Perpetuity Research & Consultancy International

- ✓ Strong values and purpose
- ✓ Clear strategies for success
- ✓ View to continuous improvement
- ✓ Supportive management culture
- ✓ Positive commitment to learning and development
- ✓ More structured approach to internal communication where everybody feels encouraged to participate and share their ideas
- ✓ There is a strong team culture where people support each other and pull together in difficult times
- ✓ The senior manager is close to the team encouraging regular discussion regarding business performance and individual contribution
- ✓ There is a culture of recognition where people feel valued for what they contribute to the business
- ✓ Enthusiasm for business development and growth into new areas
- ✓ People's commitment to the success of the business including:

    - ➢ The more I put in the more I get out
    - ➢ Will work to help the team
    - ➢ I love the job, the team the people and the supportive environment.
    - ➢ An exciting, challenging and fulfilling place to work

- ✓ People enjoy working for a great business. Comments include:

    - ➢ Not like a normal company (can talk openly and honestly)
    - ➢ Chilled out environment
    - ➢ We enjoy meeting up socially
    - ➢ If you have an idea it will be listened to and action taken
    - ➢ You are given opportunities you wouldn't normally expect

Potential areas for development

- ⬥ There is no challenge to your commitment to learning and development. There is also a healthy understanding of both the value of linking learning and development to business needs and the need to assess the impact of learning against business priorities. It might be valuable to add more structure to this strategy by designing a skills/learning matrix. This would provide information regarding current skill levels, learning priorities and a guide for both people and manager(s) to use during staff reviews.

- ⬥ The recent team away day received copious positive comments. The day gave clarity of purpose and gave the team a *"great opportunity to influence the future of the business".* We discussed targets and concluded it might be advantageous to consider both targets which, as a team, you have agreed as being SMART and looking to publish stretched targets. This will provide an opportunity to celebrate the success of achieving targets and a drive to exceed beyond expectations.

Detailed Findings

COMMENTS IN RELATION TO

> ➢ **The strategies for improving performance**
> ➢ **Strategies for learning and development**
> ➢ **Strategies for managing people**
> ➢ **Strategies for leadership and management**

The core values are clear and believed by all of those interviewed:

- To be entrepreneurial
- To operate ethically
- To exceed client expectations

The purpose of the business is to make a positive difference. Again people believe this to be wholly appropriate and can articulate what this means to them as individuals.

There is a clear strategy for improving performance, demonstrated, in one way, through the clarity of organisation objectives as follows:

- Expand industry section and to win X number of new crime and security contracts
- To retain existing membership and attract a further X members
- To refine management systems

The Business Plan sets out what people believe to be challenging but achievable targets to ensure the continued success of the business.

Through discussions with a range of people, it is apparent people have a firm understanding and belief in the new strategy for the business. Staff engagement is clearly a priority and conducted on a regular basis. People feel they have *"ample opportunity to discuss business issues, ideas and current performance levels"*.

Learning and development is planned at individual level and is a key priority of the staff review strategy which is conducted formally on a regular basis. People have confirmed the staff review as being *"a valued exercise to talk openly and freely regarding our individual priorities"*. Funding and appropriate resources are identified whilst discussing individual needs and this is seen to be, at the current time, be the most appropriate strategy to enhance talent and develop skills within the business.

Staff are aware of what to expect from their manager. One member of staff explained, *"We are a close team here and our manager is very much part of the team and takes an active role in day-to-day activities.* One member of staff explained, *"Our manager is very open and supportive; we have a great support culture here. We work together well on all issues and our manager is equally supportive regarding any personal issues we might have."*

Learning and development is seen as vital to the continued success of the business and much is done to support individual development. The business manager is totally supportive of investing in the team to achieve business success. He explained, *"We are a small team. We have worked hard to achieve openness and trust amongst the team. We are now at a stage where everybody is trusted to get on with the job and if we have any issues or problems we get together to sort it out."*

During the assessment we were able to discuss the leadership and management skills expected of current and future managers. These are as follows;

- To be responsive
- To answer questions
- To be supportive
- To make it possible to do what we need to do
- To focus on the positives
- To be available, accessible and engaged with the team
- To give appropriate recognition
- To make time for people
- To give honest feedback on performance
- To be enthusiastic and have a passion for the work
- To bring and encourage ideas

People see these attributes in their manager. Their only comment regarding development would be in the area of reading rather than scanning e-mails sent (This has been raised and discussed openly and constructively)

Appropriate quotes taken from my interviews:

"There are no limitations just opportunities"
"There are no limits imposed on learning and development. If we believe it is needed we will support it"
"We have a great attitude of we will look at what we need to do and how we can do it. We then get on with it"
"The away-day was positive in so many ways. It brought us together as a team and we now see our progress as a collaborative effort"
"Any development I have either requested or been encouraged to consider has either been delivered or actively in-hand"
"Martin is highly respected in his field but that doesn't stop him encouraging our ideas and from listening to what we have to say"
"During the away-day we fully discussed the business plan which included discussion around business growth and direction. Martin wants us to be involved"

INVESTORS IN PEOPLE | **Central England**

COMMENTS IN RELATION TO

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

People make positive comments regarding the skills, knowledge and behaviours demonstrated by their manager. Martin feels confident with all areas of people management, developed through a variety of specific training and in many instances learning from past experiences.
People describe their managers' effectiveness as follows:

- Approachable
- Knowledgeable
- Implementing flexible working patterns where appropriate
- Maintaining a positive staff morale
- Will give constructive feedback on performance
- Supportive of professional and personal matters
- Giving recognition
- Including, engaging with and empowering people

Martin explained *"We have set specific targets, which are agreed during the review, for each member of the team depending on their work responsibilities. As we all have different roles and responsibilities individual targets are dependent on what you do and will relate directly to the Business Plan"*

People feel they receive recognition from their manager. One member of staff said, *"Our manager is always aware of how busy we are and will take the time to tell us what a good job we are doing. He always makes the time to talk to us and gives out a very positive message he is very motivational and great person to work for."*

The message from senior management is people should take responsibility for their work and be encouraged to suggest ideas for improvement, be empowered to make decisions and challenge at all levels. This is a key value and, is one, which ensures everybody has an opinion and can make a difference. Martin encourages this through, for example, team planning. In all areas people feel involved with the planning activity and give examples of where they have contributed to the key targets for the team.

One member of staff explained, *"I work directly with several of our clients. I have always been encouraged to make decisions on behalf of the business. I never have any hesitation in making decisions. "*

Managers describe the range of learning and development activities available to staff. These include, for example, coaching, training courses, time spent with a client, attending seminars and learning on the job. Martin is very clear regarding his responsibility for developing the team.

Members of staff give several examples of how their learning and development needs have been met:

Example A

A member of staff explained, *"I joined with very little in the way of related skills. However, I have been eased into a project, been fully supported and I progressed to a position where I now feel very confident. It has been challenging but in a very positive way"*

Example B

Another member of staff explained, *"I have had exposure to social media which will continue to help with our research and marketing activities. I have always been encouraged to learn and develop, anything by the way of training I have asked for I have got"*

Those people new to the business speak positively regarding the induction they receive.

COMMENTS IN RELATION TO

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

The senior manager was very clear of the overall investment in learning and development.

There is learning and development budget to ensure both internal and external development is provided for all staff members.

With very clear targets regarding the financial aspects of the business, agreed at all levels, evaluation of the contribution made by learning and development activity is comparatively easy.

The manager believes the identification of talent and investment in staff development has not just enabled the achievement of targets but has put the business in a strong competitive position.

The senior manager believes the current staff skill levels will contribute to the achievement of ever increasing and changing targets. For example, he describes how the development of people in the area of client relations has had a direct impact on attracting new clients and encouraging existing clients to stay with Perpetuity Research & Consultancy International Ltd, therefore helping meet their client retention targets.

It was clear everyone interviewed had a clear understanding of the business priorities and was able to discuss the contribution made.

Martin explained, *"The influence of learning and development activity has given the team the confidence to take responsibility, enabling 'self-management'. This has released me from some of the day to day activities and enabled me to become more focused on future needs".*

Appendix 1 – Continuous Improvement Plan

Business Issue - What	Suggested Actions - How	Potential Benefit - Why	Priority - When	Solutions/Support Available - Who
Stretched targets	To develop the current planning strategy and plans to include stretched targets	This will provide an opportunity to celebrate meeting set targets whilst retaining the challenge to meet stretched targets	medium	This could easily be achieved in-house
Training plan	To create a staff development matrix	This will provide a framework to prioritise staff development in line with business priorities.	medium	This could easily be achieved in-house

Using your Investors in People Specialist as a Consultant

Investors in People Specialists offer you a wealth of resources and expertise in continuous improvement and I would like to take the opportunity to support you in progression of the areas for development noted. I truly believe I can support your own internal resource to further improve the impact these improvements will make. Just as an example, I commonly work with organisations to support programmes of development including leadership and management development, culture change and change management programmes and developing support frameworks that meet organisational values.

Appendix 2 – Assessment results summary

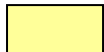The Investors in People Framework

The Evidence Requirements

The Indicators	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
1	✓	✓	n/a	✓	n/a	✓	✓	✓	✓										✓	✓	✓								
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8	✓	✓	✓																										
9	✓	✓	✓	✓	✓																								
10	✓	✓	✓																										

The number of evidence requirements met is **43**

Key:

The Core Investors in People Standard

Your Choice from the Investors in People Framework

Not part of the Investors in People Framework