

Assessment Report

Investors in People assessment report for HealthWORKS

Undertaken by
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On behalf of Investors in People North of England

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Commercial in Confidence

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BACKGROUND

HealthWORKS aim to provide support to people wanting to make positive changes to maintain or improve their health. They operate from two resource centres, one in the west end of Newcastle in Benwell and the other in the outer west in Lemington.

Through the two resource centres they offer a range of services including:

- Community Health Trainers
- Physical Activity Team
- Learning and development team
- Food skills team
- Sure Start children's' centre
- Breastfeeding peer support co-ordinators and volunteers

Various projects and work streams are delivered by the team at HealthWORKS and the charity now employs 93 people.

In recent months HealthWORKS has been affected by government cuts in both the NHS and local Council and therefore strive to find new ways of remaining financially viable.

The Board of Trustees continue to guide and steer business development and opportunity. HealthWORKS is well established within the local community and have strong relationships with many external agencies and funding providers.

Recognised as an Investor in People in October 2008 they continue to use the standard as an organisation development tool. The CEO and senior management team welcome the opportunity for assessment to give the intelligence of valuable feedback following a time of uncertainty within the organisation.

The evidence gathering exercise consisted of face to face interviews with 19 members of the team including the CEO, Directors, senior managers and a cross section of team members from all areas of the organisation. All face to face interviews were conducted at the offices in Benwell.

In addition to the verbal evidence collected, written and electronic evidence was made available to the assessor.

PRIORITIES/OBJECTIVES

At the planning meeting the Assessor met with the CEO and as a result of discussions the Assessment focussed on the following objectives:

- To assess whether HealthWORKS continues to meet the Investors in People Standard
- To give feedback on the appropriate aspects of the Investors in People framework that relates to your business objective and measures

- To provide feedback on additional areas within the Investors in People framework that the organisation may want to look at further to improve performance

CONCLUSION AND RECOMMENDATION

Having carried out the assessment process rigorously and in accordance with the guidance for Assessors as stated by UKCES, the assessor is satisfied that HealthWORKS continues to meet the requirements of the Investors in People Standard.

ACKNOWLEDGEMENT

The assessor would like to thank every person involved in the assessment for their time and genuinely sharing their story. The assessor found the team at HealthWORKS truly inspirational and passionate about their cause.

Assessor: Helen Gisbourne

Date: 22nd October 2014

EXECUTIVE SUMMARY

HealthWORKS is a dynamic organisation who is passionate about the support they offer to their clients and the local community that they serve. The commitment of the team appears unswerving and they are proud to offer services and help to local people.

External funding cuts have impacted on HealthWORKS over the last few months and the organisation has had to make tough decisions to remain viable. Redundancies have been made and restructuring of teams has helped to shape the organisation to meet future challenges. People confirm that this has not been an easy journey and that moral dipped for a time however motivation has lifted and the team fully embrace the need for change and to be fit for purpose as an organisation

The CEO and Directors have demonstrated excellent leadership skills during a time of transition and have remained at the forefront of the decision making process. They have involved and consulted with the team and as an outcome the team are fully aware of the wider political and economic agenda. They are briefed on cuts to funding and understand that all publicly funded organisations are implicated in the reduction of contracts and services.

The processes that surround managing people at HealthWORKS remain well-structured achieving desired goals and meeting the needs of the organisation.

HealthWORKS clearly demonstrates:

- A clear purpose and vision
- Embedded values
- Strong leadership

- Clear roles and responsibilities
- An outstanding team
- Effective processes
- Excellent communication
- A positive relationship with clients and all key stakeholders

There is culture of continual learning and a strong ethos of personal development. Self-improvement is at the heart of HealthWORKS and everyone strives to advance its position in the market place to enable them to continue to provide support to local people.

STRENGTHS

Leadership

The CEO demonstrates strong leadership skills and is respected and trusted by the team. She remains committed and focussed on developing and growing services for clients and seek new funding streams and opportunities. She confirms that the last few months have been difficult for many people and she has ensured that everyone within the organisation has been involved in the changes and communicated with effectively. Her open style of leadership provides the opportunity for anyone to go and talk to her about the change agenda and all team members confirm they value her open and honest approach.

Directors and senior managers are also respected and trusted by team members. They make themselves accessible and available and are compelling in their commitment to the organisation.

There is a well-balanced blend of leadership style at HealthWORKS and the senior team are aware of the need to be directive when needed. However their preferred operating style and those most observed is to be effective delegators, coaches and facilitators.

“I admire the CEO’s drive. She is very strong and keeps us fully updated”

Team

The team at HealthWORKS are a strong team who demonstrate excellent working relationships. They are inclusive and engaged and want to see the organisation go from strength to strength providing excellent services to clients. They have responded positively to the need for change to support the needs of the charity and the local community. They acknowledge that the past months have presented some anxieties and that this affected moral within the organisation, however, they confirm things have improved and that things are now “business as usual”.

There is a strong sense of solidarity and mutual concern for each other’s wellbeing and this creates a highly supportive and trusting environment.

The team operating at the coal face are impressive and passionate about the service they provide to clients – they want sustainable improvement for them.

Learning and development

Learning and personal development is at the heart of HealthWORKS and all those interviewed describe how they have improved their skills and knowledge through working with the organisation. Learning is provided through a wealth of strategies including formal external training, internally presented training, supervision, coaching, shadowing, reading, internet based learning and learning from each other. Everyone is encouraged to grow and develop at their own pace and support is provided to help everyone to be the best that they can be.

Communication

Communication works well across the teams and everyone can confirm they receive the information they need either through formal meetings, e bulletin, notice board, minutes or one to one discussions. It is always difficult to ensure good communication within organisations however HealthWORKS has developed ways to communicate that embrace everyone needs and requirements. The quarterly whole team meetings are valued by everyone and they have provided a source of information through the period of transition. It is at these meetings that individuals feel they can talk to the CEO and Directors and the team describe how they value the presence and input of the CEO. They enjoy the exercises and team activities that bring a sense of fun and also a rich blend of learning.

Opportunities and areas for development

The following recommendations are made in the true spirit of continuous improvement and provide possible solutions to current business challenges.

Managing change

It is important for leaders and managers to be aware of the complexity of change and the impact this has on individuals at an emotional and motivational level. The leadership team are encouraged to continue to manage the change agenda closely and to consult and communicate. Applying some of the principles of change and the theory used within Dr. Kubler-Ross Change Curve is useful in understanding transition within an organisational context.

“When we found out about the deficit it was a bit of a shock and there was a dip in moral”

“Change can be quite rapid and this can be difficult to deal with”

“Now I can see the benefit of change”

“We have to change or we’ll get left behind”

Management development

Defining the knowledge skills and behaviours of managers is an important aspect of organisation development. HealthWORKS include these elements of capability in job descriptions and person specifications. There is also a document “Senior Management Performance Framework” that describes “what we expect managers to do”. This is quite a complicated document that the CEO and Directors have begun to break down into a simple list of required capabilities however this still needs further work. It is recommended to review this document and maybe to discuss at an organisation wide team meeting to develop and agree.

Having clear management capabilities (that link directly to the Values) will provide an opportunity to ensure consistency across all managers at HealthWORKS. Capabilities should form part of performance management discussions and flag up learning and development needs/skills gaps.

Certainly they would also inform recruitment and selection and avoid appointing an individual who was unable to manage in the style that is required at HealthWORKS.

Values

Organisational Values that describe behaviours and how we work with each other and those that come into contact with our organisation are recognised as the bedrock of any business. Values at HealthWORKS are in fact well defined and almost an “unconscious competence”. Most certainly everyone is considered with respect, dignity and treated equally and it is clear that everyone lives and breathes the values.

Considering the recent organisational changes and the external challenges regarding funding it would be a useful exercise to revisit the values and to confirm they are relevant and in context. It would also be useful to evaluate how they inform recruitment and selection, management capability and all roles within the organisation. Reviewing Values at a Team Meeting would be a powerful activity and stimulate lively debate and a revised consensus of opinion.

Well lived and embedded values are to be celebrated as they give a powerful message to staff, volunteers, clients and other external agencies.

Reward and recognition

Research shows that people are not motivated by money alone and many other factors are important including effective managers, good communication, learning and development, good working relationships, flexible working, work life balance policies etc.

HealthWORKS is a good employer that embraces many aspects of flexible working to support its employees. A flexi time policy is operated and there are many examples of part time working. Interviewees described to the assessor how they had on several occasions reviewed and changed their hours of work to meet their own personal needs and see this is a great perk to their working conditions.

Learning and development is also a significant benefit at HealthWORKS and many staff can describe how they have developed and become more confident since joining the organisation.

All of these elements of reward should be celebrated and recognised as “real” benefits that many people in other organisations would welcome. Whilst pay and remunerations packages are important they are not always the stimulants that keep people in jobs and there are other ways of attracting and keeping good people.

Evaluation

Continue to develop a robust methodology to evaluating the impact of services on the community and other key stakeholders. Also consider, in more detail, the impact of learning and development on the success of work streams and projects.

Marketing

Consider HealthWORKS approach to marketing services and to its "brand" messages. Do we clearly get over the message of who we are and what we do and the difference that we make? Do we celebrate our success and let other organisations know how good we are?

Do we get the most out of social media? Can we gain credibility through professional use of blogs, LinkedIn and Twitter?

Feedback against the Investors in People Framework:

Business Strategy

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

There is a clear purpose and vision at HealthWORKS that is outlined in a Business Plan. Objectives in the Plan are described as resilience factors and include simple targets around areas such as staff turnover, sickness absence, management training and appraisal. There is an opportunity here to strengthen the KPI element of the plan. Possibly the introduction of clear and simple financial information may further inform the business planning process.

Plans are developed by the Board of Trustees, CEO, Directors and senior managers in consultation with the team and priorities and opportunities are discussed at team meetings and ongoing informal discussions. Everyone has an input to developing plans with their specific work streams. Certainly everyone interviewed by the assessor are well informed of the financial pressures on the organisation and the need to attract new funding and contractual opportunities.

The CEO and Directors meet weekly to discuss business plans and priorities. They constantly review funding opportunities and ways to secure financial security.

Consultation is part of the ethos and ways of working and everyone is involved as much as they want to be in developing the organisation.

"We discuss the plans at team meetings and any ideas go to the board of trustees"

"As part of business planning we look at how to attract more funding"

"It's about empowering clients to take control of their lives"

"The CEO is open with the Directors and shares business plans with everybody"

"Planning is just part of everyday regular stuff"

"We look at the emerging trends in Health economy and this informs business planning"

Learning and Development Strategy

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

The CEO and Management Team review the learning needs of the organisation and training is provided to everyone employed at HealthWORKS. The contents of the Business Plan are considered and learning needs resourced to ensure everyone has the skills and knowledge to do a good job. Training is discussed at Team Meetings, Appraisal, Supervision, 121s and through almost all activities.. Learning and personal development is at the heart of the organisation and everyone interviewed by the assessor can describe the learning opportunities they have experienced.

Examples of training and development include attending external courses provided by local colleges and other external agencies. NVQs are well represented and many employees can describe how they have participated in completing level 2 – level 4 in varying subject areas. Learning is also provided in house by colleagues who attend externally delivered training and then shared at a team level. Coaching and mentoring is also provided informally and people share experiences and nurture each other by way of personal growth and development. Networking and attending meetings with external agencies also provides valuable learning.

“An element of resourcing is factored into most projects for learning and development”
“I have completed NVQ level 3 in management”

People Management Strategy

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

Relationships are vital and everyone works well together. The CEO and Directors are accessible, visible and hands on and ensure the team are all treated equally. The team all receive the same opportunity in terms of learning and development, communication, reward and recognition and feedback for a job well done. Staff confirm there are no division in how people are treated and feel they receive all the support they need to do a good job.

There are many examples of individuals requesting to change their working hours to fit in with external and personal pressures and everyone’s specific circumstances are reviewed.

Certainly the attitude of staff towards clients is one that sits with the Values and respects everyone’s abilities and orientation.

“I have never experienced anyone being treated less favourably”
“I have learnt not to judge anybody”
“We all have access to training, appraisal, supervision and team meetings”

Leadership and management

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

Management capabilities are described in job descriptions and person specifications. There is also a Senior Management Performance Framework that list a significant number of capabilities required by managers. There is work ongoing to simplify what is quite a complex document and recognition that this need to progress. Certainly in the light of employing any new senior managers these capabilities will be instrumental in ensuring the right person is appointed for the job. The CEO, Directors and management

team can describes the need to plan, set goals, understand financial performance, communicate, feedback, provide learning and development, deliver effective appraisal and supervision and measure performance of the team.

The assessor would describe the CEO and Directors as excellent role models who work passionately with staff and clients and enable them to identify they too have choices and opportunities in life.

“I need to communicate, provide Supervision, train staff and monitor performance”

“I am developing the management capability document”

“Managers need to be supportive, empowering and trustworthy”

Management effectiveness

Managers are effective in leading managing and developing people

This is very much as described above. Senior managers are instrumental in leading the team and are aware of the capabilities required to do this effectively. They provide constructive feedback to each other and staff through an informal and ongoing dialogue where expectations and requirements are discussed. Appraisal and Supervision is ongoing and provides a quality environment in which staff can discuss any issues and concerns.

The team confirm they are given the feedback required to do their job. They know they are doing a good job and this is discussed on an ongoing and informal basis.

Management development is offered through the NVQ route, external management training events, learning from internal expertise, coaching, shadowing and mentoring.

“My Manager is brilliant and I have an awful lot of respect for her”

“Feedback is ongoing here and we have formal Supervision to support this”

“Team meetings are an excellent way of reviewing how we are doing”

“I feel very lucky in how I’ve grown and developed through this journey”

Recognition and reward

People’s contribution to the organisation is recognised and valued

The team at HealthWORKS are a passionate and self-motivated team who believe in the success of the services they provide to clients. Unlike many other organisations they derive a deep sense of reward in the knowledge that they improve the lives of those individuals who access the services they offer. This is a vocation and staff go above and beyond to support clients, their families and friends. It is this stimulus and “wanting to put something back” that provides the greatest reward to everyone.

All staff describe they are able to make a contribution to the success of HealthWORKS. They are able to improve the way they work and feel empowered to make decisions and take ownership for the work stream or project they are involved in. All the team understand the impact their role has on the success

of HealthWORKS and its reputation in the local community and with external stakeholders. They feel trusted and proud to be part of the organisation. There are examples of volunteers who have taken on permanent employment at HealthWORKS, volunteers who have been able to enhance their CV and job opportunities as a result of their involvement at HealthWORKS and many examples of staff that came to the organisation with no qualifications whatsoever and who now are proud to be qualified to do their job.

It is recognition and reward enough to be part of the support services offered to clients and everyone is proud of their achievements as individuals, a team and an organisation.

"I want to put something back"

"I feel privileged just being here"

"My manager is very encouraging and appreciates us"

"HealthWORKS has helped me in pushing my personal boundaries"

"Flexi time is an excellent benefit"

"I am blessed to work here"

Involvement and empowerment

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

Again the culture at HealthWORKS ensures that everyone is involved in daily decision making that impact on the quality of the service provided to clients. The senior team involve all staff in business development and discuss priorities and pressures. This is done on an ongoing basis and through both formal and informal mechanisms. Everyone confirms they are able to contribute ideas and especially to shaping specific projects they are involved in. Staff describe how they have been involved in shaping projects such as "Living well, Taking Control", Community Health Trainers, Food Skills, Change4Life and Breastfeeding plus many other initiatives delivered by the team.

Staff who work in central services such as Finance, Caretaking and Admin also are involved in shaping services and recognise they are both instrumental and critical in ensuring services to clients are not disrupted.

To support a greater understanding of financial performance the Finance Manager is currently working on presenting financial information in an easy format for those who are not financial experts. This is helping the wider team to be aware of financial pressures and to scrutinise progress against contracts.

"Everyone is included here and we bounce ideas about all of the time"

"I have helped to develop "Love Food, Hate Waste" and introduced cooking challenges and practical exercises"

"I am not over powered by my manager and am encouraged to take the initiative"

"I'm involved in shaping how the finance service is run"

"It was my idea to run gym challenges"

Learning and development

People learn and develop effectively

The management team are committed to allocating resources to enable effective provision of learning and development. There are examples of attending external training courses and especially where this requires external certification to meet the legal requirements of the job. Internal learning and development opportunities are important to the success of the organisation and the Senior Managers are instrumental in coaching and mentoring team members.

There is a formal induction process that has been improved. Those new to the organisation can describe how they shadowed other members of staff to ensure they were familiar with how HealthWORKS operates. Everyone confirms they were shown around the premises, introduced to colleagues, met with key individuals and given policies and procedures. Necessary mandatory training is provided and ongoing support through Supervision. A probationary period ensures employees are right for the organisation and the organisation is right for them.

“My manager supported me in studying for a degree and now I’m embarking on a Masters”

“I completed the on line training in Child Nutrition and then shared that with the team”

“Because of the training I can now do power point presentations”

“I’ve completed NVQ 2 in Customer Service”

“I’ve done my Personal Trainer qualification level 3”

Performance Measurement

Investment in people improves the performance of the organisation

The CEO and senior team ensure that they invest in the appropriate resources to improve organisational performance. Where new work streams are introduced staff are fully trained to deliver services. This is evidenced in all areas of the organisation and for example developing Community Health Trainers. This is a significant investment in staff and their skills and, once fully trained, is extremely valuable to HealthWORKS and clients. Additionally training staff in the Living Well, Taking Control initiative is also enormously important to the success of the organisation. Managers are instrumental in supporting their teams to be fully operational to deliver services and staff all confirm they are given the tools and skills to do a good job.

Everyone can describe the learning, personal and professional development they have experienced whilst working with HealthWORKS. For some, this is learning about organisational development and business planning. The finance team are coaching colleagues in understanding financial information, colleagues coach each other in the effective use of IT and there are excellent examples of managers developing the proactive use of social media and marketing techniques.

Other external evaluation of organisational performance comes through other bodies including Ofsted, Impact Award and MHFA House of Lords Award. Investment in learning and development in the Childcare aspect of HealthWORKS has improved the Ofsted Inspection from “Needs Improvement” to “Good”.

“We measure performance through our service level agreements, how we are assessed and audited”

“We continually measure performance through our management accounts”

“We evaluate performance through staff turnover, both keeping staff and staff moving onto better jobs”

Continuous improvement

Improvements are continually made to the way people are managed and developed

The organisation is committed to continuous improvement and embraces feedback that enables them to up their game. Development of the team supports applications for funding and in particular accessing the Lottery Funding and other awards. Going forwards the accreditation as an Investor in People and the involvement of the assessor will drive forward continuous improvement.

Improvements commented on by the team include:

Clearer direction of where the business is going

Improved communication

Introduction of e bulletin

New services for clients

New work streams

Appointment of an HR specialist

Dynamic and well-structured team meetings

Better premises

This is a passionate and dedicated team who strive to continually improve and to secure the future of HealthWORKS for the people of Benwell and Lemington.

“We have become more flexible and nimble in responding to change”

“We should sing from the rooftops about what we actually do here”

“We are much closer as a workforce and that is much better”

“It’s about honesty and realising no question is the wrong question”

