INVESTORS IN PEOPLE
Assessment Report

Ceilite Air Conditioning

December 2015

Key Information

Assessment Type	3 year Assessment
Investors in People Specialist Name	Viv Scott
Visit Dates	December 21st and 22nd 2015
Assessment Enquiry Number	ENQ – 98190 – 01FP2G

Conclusion

Ceilite Air Conditioning have met 192 evidence requirements at this assessment which is well over the 165 required for the Gold Award – therefore the company has very successfully maintained their Gold Award accreditation. Congratulations to all involved!

Introduction

Ceilite was initially recognised as an Investor in People in December 2003 and this is their 4th review. They achieved the Gold Award in 2009 and have maintained this accreditation since that point. They provide installation and maintenance services for air conditioning and heat pump systems nationally. They offer a complete service covering design, installation, servicing, and maintenance.

There are 3 Directors and an additional 4 managers on the management team. There are three main teams covering the office (10), service (6) and installation (10).

A sample of 12 people out of the 26 (46%) were interviewed for this review and this covered all the different teams within the business as well as new starters.

Milestone Dates

Review of Continuous Improvement Plan *18 Months from Assessment date*	June 2017
Completion Date of Next Full Assessment *36 Months from Anniversary Date*	December 20th 2018

Specialist Name: Viv Scott
Investors in People Specialist

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Executive Summary

The majority of the supportive management practices have been in place for some time now and the detailed report reflects this picture with many areas similar to the last report. This summary points out the main updates in terms of key strengths and suggestions for improvement.

Key Strengths

- Very good external links with professional associations, suppliers and clients to keep ahead of the market needs and provide a sustainable business
- Clear overall aims and updates on priorities through regular communications channels through formal and informal methods
- Project work now includes a full service covering wider client needs on mechanical, plumbing and electrical work
- Caring supportive management culture with ongoing discussion, listening to needs and agreeing solutions that fit all involved
- High standards expected and monitored in: technical ability to carry out a high quality job, health and safety to reduce risk, customer service, management and coaching support
- Clear expectations for all with discussions on performance informally day to day and formally at annual appraisal
- Everyone feels involved in plans and changes and can challenge ways of working so that ongoing improvements can be made
- Learning and development is very well coordinated with regular updates to cover all the different team's needs and a strong health and safety culture that everyone has bought into
- Managers discuss career development and look at job broadening activities to support personal development and growth
- There is a high level of effective coaching to support people's development
- Newer people felt very well supported and were enabled to contribute early on
- Flexible working options can be discussed at any time and solutions agreed
- Everyone gave good feedback examples of effective leadership and management support
- Everyone felt valued for their contribution and for extra efforts and good ideas. People enjoyed helping others to learn and felt valued by the company's trust in them to help others.
- The total reward package is seen as very good with non-financial and financial recognition including bonuses if the company does well. There are also many social activities including Christmas and summer parties.
- Knowledge and learning is shared through both informal and formal communications channels to ensure that everyone is up to date.
- People strategies are updated as needed as people provide feedback on ideas for improvement
- There is good use of external reviews and benchmarking to provide input for ideas for improvement to ensure that good practices are kept up to date.
- Everyone believes that Ceilite is a great place to work

Suggestions for improvement

- Ensure that there are effective succession plans in place for people considering cutting down their hours or retiring
- Consider the Global Reporting Framework for Sustainability to help promote the company's actions and progress to employees and clients
- Consider clustering the expectations within appraisal so that they are easier to remember and use for continuous improvement
- Make use of the 18 month meeting to look at the new IIP6 framework to help with preparations for the next assessment

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Detailed Feedback by Business Objective and People Issues

The following feedback has strengths written in black and *suggestions for development in blue italics*. The structure has been formatted to the agreed people issues from our planning meeting.

Business Objective 1: Successful Business Survival

1.1 Keeping people in work

Including: Organisation has vision/strategy/plan (1.1, 1.2); People are involved in planning (1.4, 1.6); Representative groups are consulted (1.3, 1.5); Social responsibility is included in strategy (1.10, 1.12, 1.16, 1.18, 1.22, 1.25); Learning and development strategy builds capability (2.5, 2.8, 2.12, 2.14); People are helped to develop careers (5.11, 5.18); People believe they make a difference (6.2); People believe their contribution is valued (6.1, 6.3); People given opportunity to achieve potential (8.9); Personal development is supported (8.12, 8.19); Career prospects improve (9.12); People believe it is great place to work (10.15)

Strengths

There is a clear set of aims which people are aware of through regular communications and minutes from the health and safety committee meetings. There are also **clear objectives**:

- Consolidate the business and retain the current team of people

- Be selective with new clients (to meet the following objective)

- Be profitable

- Provide high quality customer service which is right first time - to gain repeat business

Any updates to aims and objectives are communicated through the 6 monthly health and safety meetings and on an on-going basis day to day through memos and texts.

There are 3 main types of group **meetings**:

- Directors meetings (3 Directors)

- Management Team meetings (3 Directors plus 4 managers)

- Health and Safety Committee meetings (all have access with representatives from each area always present and an average of 15 people at each meeting with minutes for all)

There are strong links with the industry associations (B&ES) with one Director a previous Chair of the Refrigeration and Air Conditioning Group and now a committee member. This supports awareness of new legislation that is likely to affect the industry as well as new research that will support the company's objectives. There are also good links with the manufacturers – all these links help to monitor changes and trends and link this information into future strategies for the business.

People are involved in adjustments to plans and future developments and people's feedback is taken on board through these meetings and through day to day discussion with line managers. There are clear targets in terms of standards of work, procedures, regulations, expected timescales and customer service.

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There are many parts of the main business that are part of **social responsibility** such as the refrigerant controls and accreditation (all engineers are accredited to level 1 (the highest) with F-Gas. Initial designs for customer systems include minimising carbon footprints. In addition to these the company sponsors community activities such as the Harlow Sporting Club events for handicapped children and encourages people to become involved in supporting these events. The office recycles ink cartridges and the lighting and air conditioning in the building has been updated for efficient energy use. There is an Environmental Policy which sets out the key areas for action.

Because of the involvement in the Industry organisation B&ES there is prior knowledge of any updates and changes that are likely to be required for the future. The F-Gas accreditation was one example at the last assessment and at this assessment they are looking into a new refrigerant that is being considered as a safer gas. This early involvement puts Ceilite ahead of many other suppliers. Other learning and development that is **building the company's capability** includes regular Health and Safety updates and checks on people's skills and also some overlap between installation and maintenance to improve flexibility for peak periods.

Career development for engineers is very clearly structured through on the job learning with a variety of experienced people and diarising work done with weekly monitors to see the extent of the work covered by each person. A new engineer starts out as a mate and develops into an improver and then a junior engineer – all based on the level of experience and performance of the individuals.

For other roles there are broadening activities and managers include people in these when they show interest. This includes more involvement in design work, project management, and deputising for the manager in their absence. There is much discussion with individuals to help people to grow in their role and **achieve their full potential**. This could involve trying other roles to see if it fits both parties with the option to return if the previous role were preferred. But even where they have returned to a previous role there were still additional skills learnt which have enabled them to provide additional services for the company such as project management, office administration and service coordination.

Personal development is supported in terms of building relationships, developing a professional work ethic, supporting others and broadening roles to provide a wider group of services for the company including deputising for managers.

Everyone felt that they had developed their knowledge, skills and behaviours within the company and this had **improved their career prospects**.

Managers explained that they recognised and **valued people's contribution** through spotting good work and letting people know and saying thank you for extra efforts. Customer letters thanking the company for their good work were shared so that everyone knew. There are also many other ways of valuing people which are in regular use here these included:

- ❖ Clear overall company aims and objectives with regular updates
- ❖ Regular discussions on development opportunities and opportunities to grow
- ❖ Control over the job day to day once proven to be independent
- ❖ Listening to ideas and improvements and taking them on board
- ❖ Being involved in decision making

❖ Being given responsibility to run more difficult jobs when ready

❖ Being given the responsibility to support others to learn

❖ Being given the opportunities to use their strengths and skills

❖ Having the right level of challenge in the job to be interesting but not outfacing

❖ Having opportunities for social networking (which provides a source of strong moral support) through social events and visits to the local hostelries.

People confirmed all these methods and felt that they performed a valued role in the company and contributed to its success.

Everyone felt that Ceilite is a **great place to work** and the descriptions given included: friendly, fun, positively challenging, professional, interesting, supportive, very understanding, flexible, can be intense when busy, knowledgeable, good team working and a great atmosphere.

Areas for Development

Although there is good work here on social responsibility and some areas are a key part of the strategy (such as looking at the new refrigerant), and there is a clear overall Environmental Policy with linked actions – there wasn't a clear understanding of the overall picture as yet to enable the company to meet the requirements that Social Responsibility is at the heart of the culture for managers and people. Consider looking at the Global Reporting framework for Sustainability to help you promote the range of actions that you cover to all.

1.2 Choosing paying customers

Including: Key Performance Indicators are used (1.9, 1.15, 1.21); Impact can be demonstrated (9.2, 9.3, 9.4, 9.5); Impact on Key Performance Indicators can be described (9.7); Performance improves as a result (9.11, 9.13, 9.14)

The notes below aren't all directly linked to this heading of choosing paying customers – although they all relate indirectly.

Strengths

The **key performance indicators** in current use are ones to maintain good financial performance, such as the level of repeat business with known paying customers and the level of Health and Safety updates and skills checks that people have carried out to ensure consistent high quality work. This supports the key marketing approach of spreading business through good word of mouth. There are norms used for estimating costs for new work but these are used intelligently as each job has different variables. In the field the experienced engineers know to get the job done as soon as possible whilst doing a quality job and they coach new engineers in this same way. This has been found to be more effective that having a set known time for a job which might influence how new people work. There is good feedback between engineers and estimators to ensure that new projects include any updates that might affect cost.

Examples of impact as a result of learning and development include:

- ❖ Reduced risk of accidents from the company's very well embedded approach to health and safety via well monitored toolbox talks and e-learning refreshers.

- ❖ Improved flexibility in skills such as the installation team also commissioning some equipment to improve completion times for the customer and save money for the company. There is also more multiskilling within the office to provide greater cover for holidays and sickness.

- ❖ Promotion and development from within has enabled a well embedded high level of customer service and high quality standards of workmanship

- ❖ Training on a new pipe connection method enables work to be done without a hot works licence – saving time and insurance costs – and enabling work to be done in areas which cannot allow hot works.

- ❖ SSSTS Site Manager training has enabled greater access to winning jobs as this is a set requirement for some contracts

- ❖ Manufacturer's training ensures that the servicing team is able to find solutions to customer problems in a much shorter time

Evaluation information is used at management and directors meetings to adjust future strategy ensuring that more engineers have the SSSTS certificate to give greater flexibility in the field and cascading the new pipe connection method as needed for projects that include this technique.

Managers gave examples of learning and development improving performance within the team which mainly linked to people being more independent and able to carry out specific jobs without supervision; being able to carry out more complex jobs; and being able to help new people to learn.

Individual examples of impact as a result of learning and development included:

- ❖ Courses on Brazing, Mobile Towers, Scissor Lift – all essential requirements for the job.

- ❖ Courses from manufacturers to learn detailed maintenance of the equipment

- ❖ Learning on the job to pick up the necessary engineering and customer service skills for installations.

- ❖ Learning through shadowing and then running different parts of a new role with supportive feedback – to take on a new role and to cover for other roles.

There were a number of **improvements as a result of people management** activities these included: a wider variety of work has been sourced to maintain workflow this includes full service projects with additional mechanical and electrical work; saving people's time now that a strong health and safety culture is well embedded – through holding the health and safety committee meetings every 6 months rather than quarterly; and greater cover within administration.

1.3 Providing appropriate services

Including: Learning priorities clear, Resources available, Impact evaluated (2.1, 2.2, 2.3, 2.4); Plans take account of learning styles (2.10, 2.15); People help decide their learning (2.9, 2.13, 2.16); Learning and development is innovative and flexible (2.6); Culture of continuous learning (2.7, 2.11, 2.17); People are encouraged to contribute ideas (3.1, 3.5); Diverse talented workforce created (3.7, 3.11, 3.12, 3.15, 3.23, 3.28); Constructive feedback is valued (3.9, 3.17, 3.25); The structure makes most of people's talents (3.10, 3.18, 3.20, 3.26); Coaching is part of the culture (5.8, 5.12, 5.19, 5.25); People's learning needs are met (8.1, 8.2, 8.3); Investment in learning can be quantified (9.1); Flexible approaches to measuring ROI (9.8); ROI reported to stakeholders (9.9)

Strengths

Learning priorities are very clear for the company as a whole and for the different teams. The main area is in keeping up to date with technology and new products as well as new regulations and industry trends. One of the Directors is on one of the B&ES Specialist committees which ensure that current trends are known early and can be incorporated into future plans. Each team (installation, service, and office) has different needs and team managers were clear on the types of needs and methods to cover these whether they were new products, accreditations, Health and Safety refreshers or on the job training and experience.

There are training matrices to ensure that the right amount of cover is available for the different roles and safety needs. In addition newer people who are developing (apprentices – including mates, improvers and junior engineers) keep diaries to log the work they do and any learning points covered. These are monitored weekly to ensure that individuals are covering the ground they need and they are also read by engineers to see what types of work each new person has experienced before going out to the job.

Impact is evaluated through monitoring outputs including observation for engineers, informal coaching progress, and level of independence in carrying out the different activities. Some learning such as the Health and Safety PC training has a quiz at the end to test the learning and ensure that people have refreshed their knowledge. Other learning such as the F-Gas accreditation includes an exam.

Although **learning styles** weren't mentioned directly people did feel that their preferred methods were taken into account through the types of learning and development that were provided. These included regular updates for Health and Safety (via cards and e-learning), procedures (via Scope of Works) and risk assessments so that all areas were covered at least once a year. Other external courses covered a good mix of theory and practical to keep people interested and involved in their learning. People liked the on the job learning as they felt they were contributing to the company while they were learning and it was giving real life experience of typical jobs. Newer people work with different engineers to vary the coaching styles and range of effective techniques used so that individuals can find ways of working that fit best with their own.

There are some good examples of how learning and development is **innovative and flexible** these include the Human Focus courses for Health and Safety refreshers through the PC web software - which includes a number of modules with videos and tests for each one. People can pause and break when needed with this method so it can fit with their schedules.

Another novel method has been used for covering Tool Box Talks through playing cards with each of the different areas on a separate card. People cover at least two of these each week

so that they are all covered at least once a year. This method is also liked and has been very effective in reducing accidents - as well as winning a National Training Award.

People agreed that there is a **culture of continuous learning** which covered many different areas such as new products, new equipment, better ways of working, dealing with different people, reminders of Health and Safety issues, working procedures and risks and always looking for improvements. Managers ensure that they keep themselves up to date and many continue a learning log of their own to record new techniques and key information for their role.

Everyone is very much encouraged to put forward **ideas for improvement** through day to day working discussions, Health and Safety committee meetings, appraisal discussions and at any time through talking to managers. There were many examples of good ideas that had helped such as using a new cold pipe connection system so that a hot work permit isn't required – which saves time and insurance costs, and enables work to be carried out in areas where hot works are not possible; new pipe bending equipment that is easier to use; use of Smart phones and tablets to ensure access to key information about the client's equipment and enable more efficient and effective customer solutions; adjustment in the updating of the training records so that past history is still easily accessed; and use of more basic labourers on jobs to free up engineers to carry out the specialist work more efficiently.

There is a policy of growing people from within the company as this has been found to be most successful in finding people that fit with the culture and aims of the business. This has resulted in a close knit team of **different people to meet the different skills** required in installation, service and administration. There is a friendly banter between departments and there are a number of social activities arranged to ensure that everyone knows everyone else within a more informal environment to maintain a whole team spirit. Funds for these activities come from everyone collecting and selling the scrap copper from the daily activities. A range of different activities are used (Bowling, Golf, Go-Karting, and Summer Family BBQ) to try to cover different people's preferences.

There is a range of people at Ceilite from different backgrounds and anyone that applies and fits the criteria for the role is taken on board and supported according to individual need.

Everyone felt that **constructive feedback** was valued and encouraged through day to day discussion, Health and Safety committee meetings, and proof of action on feedback given. Examples include those given for ideas above.

People felt that managers were good at spotting their particular **talents** and encouraging them in their development so that they could find a role that fitted their needs and helped the company.

Coaching is very definitely part of the culture here it is an inherent part of the way of working. It is informal but very effective to fit both the company's and people's needs. Everyone acts as a coach for others whether in a more structured way through the apprentices or through sharing knowledge and experience day to day. Coaching is also the key way in supporting managers in their development.

Each team's manager ensures that the **learning and development needs are met** through discussion after activities such as specific courses and through monitoring outputs from observations and worksheets. Many courses have specific tests or exams at the end to check both knowledge and skills e.g. the e-learning refreshers. Newer engineers' diaries are

checked weekly to ensure that a broad range of experiences are covered to help them progress.

People confirmed that their learning and development needs were met. New people were very happy with the support provided during their **induction** to their new job so that they could be up and running quickly. For the new people interviewed this included going through the necessary policies and Health and Safety procedures and then on the job training by an experienced job holder so that all the areas could be covered. Where specific accreditations are needed these are organised centrally and time programmed in for the individuals involved. There is on-going line manager support with additions of new roles as needed. People changing roles also felt well supported for their new role through coaching support.

There is a **learning and development budget** to cover all the Health and Safety, technical and improvement needs for the company. There is also considerable time spent coaching others to meet the needs of their role. If a need is seen during the year with a clear outcome then money will always be found to meet this requirement. This includes new products or techniques such as the cold pipe connection system.

Areas for Development

To meet 9.8 and 9.9 there would need to be much more information on the costs of learning and development and the individual, team and company benefits which is visible to everyone.

Business Objective 2: Business efficiency

2.1 Updating procedures

Including: Ownership and responsibility are encouraged (7.1); People are involved in decision making (7.2, 7.3); Effective consultation is part of the culture (7.4, 7.6, 7.7, 7.13, 7.17); Knowledge and information are shared (7.5, 7.10); People can challenge procedures (7.18); Sense of ownership and pride (7.19); Learning & development resources used effectively (8.4); Innovative and flexible development (8.5, 8.14); Self and external reviews used (10.4, 10.5, 10.10, 10.11, 10.12); Feedback used to understand people's views (10.6, 10.7)

Strengths

Everyone felt **involved and part of the overall decision making** through the Health and Safety Committee meetings and the way they were encouraged to provide input at any time. People felt that their opinions were listened to and if possible ways would be found to make the adjustments needed. Appraisals were another opportunity to provide input and discuss potential changes.

There is a high level of **autonomy** here once people are trained within their role. People greatly appreciated this trust and explained that they had back up when needed if there was an issue that was unfamiliar.

There are a number of internal communications routes to support **consultation** as well as **sharing knowledge and information** and these included:

- Updates to Tool Box Talks, Risk Assessments and Scope of Works from people's feedback (day to day and through meetings)
- Day to day discussion with line managers
- Phone discussions with managers and colleagues to share new information and specific customer information
- Memos on changes including updates to equipment manuals, company progress and newsworthy events
- Texts for more immediate communications
- Directors, management and Health and Safety meetings and the cascade of information from these
- Appraisal discussions
- Methods manuals including ones for office tasks

People felt this range of methods was effective for the different needs in the company and helped to give them the information they needed so that they could make appropriate decisions and gain updates on any changes that affected them.

Everyone felt that they could **challenge procedures** and if agreed at the Health and Safety meetings then these would be updated.

Everyone was **proud to work for Ceilite** – for its high standards of workmanship, good customer relations and its caring commitment and support of employees.

A wide variety of different sources of **learning and development** are used so that they are **effective** for the different purposes - including manufacturers courses (many of which are free), B&ES courses for accreditation including F-Gas, on the job coaching and refreshers including Tool Box Talks, Risk Assessments and Scope of Works, PC web-based learning for Health and Safety, Construction accreditations such as IPAF and SSSTS, self-learning through internet searches and reading, industry magazine updates and B&ES committee updates.

Innovative and flexible methods are investigated and used such as the web access Human Focus courses. The Playing cards for Tool Box Talks won a National Training Award and are helping to maintain their very low accident rate.

People felt that they are very much **encouraged to try new approaches** and learn from their efforts, mistakes and successes and that there is good flexibility to learn by doing - on low risk activities with feedback - so that they can learn from their mistakes or omissions. People felt this really helped them to learn more effectively.

There is much **self-review** within this company with a wide range of people involved in making the required adjustments such as updates to the Risk Assessments and Scope of Works. There is also a range of **external reviews** including Investors in People, ISO 9001, and B&ES. The company uses their applications for awards as a learning and review mechanism as well. There are more specialised groups within B&ES (RAC and REFCOM) where more detailed comparisons and benchmarking are used to support improvements. Working with B&ES has led to the F-Gas accreditation for all Engineers and is providing updates on potential new safer gases.

Feedback methods used currently include daily discussion, an open door policy and practice for all managers and Directors, Health and Safety Committee input, and there is a suggestion box if people wish to use this for any anonymous improvement ideas. A number

of improvements have resulted from people's feedback which has already been listed in other sections of this report.

Areas for Development

There were a few issues regarding information about client's equipment and history which is kept in a file on the client's premises. If work is carried out at weekends then access to this file can be difficult. Engineers are looking forward to easier access to files through tablets which will solve this problem.

There were requests for service meetings to help share knowledge and information across this team. Greater access to industry magazines would also help. There were also requests from this team for more information on the whole week's jobs so that they could plan their home life more effectively. Currently this is done daily.

The introduction of tablets was also being hailed as the solution for better communications on client information for installation and commissioning to speed up the paperwork side of the role.

2.2 Continuous improvement

Including: People are involved in strategy development (1.8, 1.14, 1.20); People are trusted to make decisions (7.9, 7.12, 7.14, 7.15); People are committed to success (7.16); Culture of continuous improvement (7.8, 7.11); Learning is everyday activity (8.8, 8.11, 8.13, 8.15, 8.16, 8.18); Learning is celebrated and valued (8.6, 8.10, 8.17); Mentoring is used (8.7, 8.20); Contribution of people strategies is measured (9.6, 9.10); Benchmarking used (10.8)

Strengths

The Health and Safety Committee meeting discussions involve a certain level of **strategy development** and therefore includes everyone within the company. The overall main strategy comes through the Directors and Managers meetings and people can input via their manager.

Managers are good at knowing who has expertise in specific areas and can match up these people with any individuals needing guidance in these areas. Much of the **sharing of knowledge and information** is done by phone and by going on-site with two people one of whom has come across the problem before. Once on-site people are very much trusted to make the right decisions based on their knowledge and experience and the clear standards and procedures provided.

Everyone here is very **committed to the success of the company** and appreciates the support provided so that they can carry out a very good job for the customers.

There is a **culture of continuous improvement** through on-going adjustments and changes to improve performance with everyone involved and encouraged to contribute ideas. There were many examples of these being taken on board and rolled out across the company. As a result people feel that they can **challenge the ways things work** in order to improve performance.

Learning is seen very much **as an everyday activity** as each customer's job is different from the last. Where there is new information this is shared via the managers to others that need the update via text messages, memos, and information in people's pigeon holes. **Knowledge and learning is also shared** at the Health and Safety Committee meetings. When people have attended the larger courses the materials are copied and shared to the others needing the update. People know who's who for expertise and knowledge is shared through phone calls as people need particular expertise day to day. **Everyone enjoyed learning** and regarded this as one of their motivations at work as the job was always varied and interesting.

There is an immense amount of learning and development in place to meet regulatory needs including Health and Safety updates and refreshers. These essentials wouldn't have great celebrations necessarily although **people's successful accreditations (such as F-Gas and SSSTS) are certainly congratulated** at Health and Safety Committee meetings and through social events.

Mentoring is used informally in a similar way to coaching with people paired with a more experienced person to learn the ropes both technically and on customer service. This includes mentoring on wider aspects of the business for managers learning different roles such as system design or for a new manager. There has also been mentoring between different departments which have supported greater understanding of the business as well as enabling better cover.

There is **evaluation of how the company's people management and development strategies contribute to performance**. This comes through: customer feedback; meeting costings for the job; retaining staff; the level of commitment and ideas for improvement that come from everyone; feedback from everyone on different processes and procedures; and feedback from outside sources on new developments such as the National Training Awards on the new Health and Safety cards.

Benchmarking comes through the involvement with B&ES and its specialised groups such as RAC and REFCOM where more detailed comparisons are used to support improvements. Working with B&ES led to the F-Gas accreditation for all Engineers and is providing updates on a potential new safer gas.

Areas for Development

Consider a rolling review of people management and development strategies to ensure cost-effectiveness and improvements of all the different areas.

Consider a broader content of mentoring to include commercial awareness to enable everyone's greater understanding of the business and put forward broader ideas for improvement.

Business Objective 3: Healthy and safe working environment

3.1 Identifying risks and monitors

Including: There is equality of opportunity (3.2, 3.3, 3.4); Work-life strategy meets people's needs (3.8, 3.13, 3.16, 3.21, 3.24, 3.29); Managers are clear about the capabilities needed to lead (4.1, 4.2); People know what effective managers should be doing (4.3); Managers are effective (5.1, 5.2, 5.3, 5.4); Culture of openness and trust (5.21, 5.24)

Strengths

Support is provided in different ways for different needs. This includes new starters working with an experienced person to learn the job, engineering apprentices are asked to keep a diary of the work that they have done and the learning achieved during that week so that progress can be monitored and supported. As new people become more experienced they don't use the diary but use a notebook instead to log any new techniques or information for future use. There is a good understanding of different people's needs and a willingness to let people try different roles to see if it fits the person and the company needs. Health and Safety Committee meetings are open to everyone with representatives from the different areas to ensure that the different team's views are included.

There have been great efforts to retain the team in the difficult economic climate. People have been kept up to date with this situation and appreciate the efforts made. It means that for some areas work can be extremely busy at times with work away from home and in the evenings. Managers monitor this carefully to ensure that the **work is allocated fairly** and if someone is showing signs of wear and tear then more break time is offered to enable them to recharge their batteries. There is a good system in place for overnight work with TOIL the following day. There are also good examples of additional support and time provided when people are trying a new role with the opportunity to return to previous roles if that is preferred. There is a good flexible working policy which people appreciate with options including reducing hours temporarily or permanently depending on needs. Options are discussed with managers to find a workable solution for all. There is also day to day flexibility with great support for family needs.

Competencies are used for all roles with one set for managers' appraisals and one set used for people who don't have a management role. These are the same as the ones used at the last assessment. There are many overlapping competencies between the sets.

A comparison is given on the following page.

The symbols next to the competencies in the manager's column represent a possible way of clustering them to simplify the list so that it's more memorable.

Managers	Non-managers	Possible update
1. Commercial awareness~	1. Ditto	
2. Performance/Results	2. Ditto	
3. Decision making	3. Productivity	Could be combined
4. Financial awareness~	4. Ditto	
5. Leadership	-	Add in coaching for non-managers
6. Planning/organisation)	11. Reliability	Could be combined
7. Work organisation)	5. Ditto	
8. Self-management)	6. Ditto	
9. Professional/technical-	7. Ditto	
10. Innovation-	8. Job Knowledge	Could be combined
11. Communication impact	9. Ditto	
12. Continuous improvement-	14. Quality	Could be combined
13. Efficiency)	10. Ditto	
14. Adherence to policy~	12. Ditto	
15. Care	13. Ditto	
16. Ultimate service-	15. Ditto	
17. Integrity	16. Ditto	
18. Teamwork	17. Ditto	
19. Fun	18. Ditto	

So a possible clustering could be:

- Commercial awareness (including financial awareness, adherence to policy plus knowledge of the market)

- Leadership (including integrity, performance/results, decision making, communications impact, team-working, caring and fun)

- Organisational skills (including planning, efficiency, work organisation, productivity, reliability and self-management)

- Quality (including professional and technical knowledge and skills, innovation and continuous improvement, ultimate customer service)

Managers were clear on the competencies and used them to score performance at **appraisal**, the individuals also score themselves and then these are compared with the manager's scores and used as a basis for discussion. For people in developing roles there is a more in depth discussion on the competencies. For people who have been in their role for a longer time there is less discussion needed but more use of daily updates and feedback as needed. The scoring sheet includes guidance on what the scores mean and the types of behaviour involved. Managers here have been with the company for many years and the culture of supportive management is led from the top and well embedded throughout. The competencies are still used for discussion and informal coaching to meet the needs.

People's expectations of managers were consistent and were a fair match to the one's written within the manager's appraisal. The competencies have helped to put the supportive ways of working into words which helps people to understand what is expected and to discuss it more easily. Managers have many **examples of support provided** including regular communications to ensure that people were able to carry out their work effectively

and had appropriate opportunities for learning and growth. There were good examples of picking up vibes when people were overworking or having difficulty with a particular job and providing the right level of support to help them through this.

Appraisal is annual, there used to be an interim 6 month update but everyone felt that there was enough informal discussion day to day to meet people's needs so now the appraisal is an annual summary with people able to request 121 meetings at any time. This is more likely for people in newer roles who are still learning all the different aspects of their job.

People were very **complimentary about their managers** and felt that they could talk to them about any issues and receive a positive response. They felt that all managers were approachable, listened, acted on specific needs, appreciated good work, enabled learning and development to take place, knew their strengths and areas for development, knew what they liked and didn't like, provided appropriate opportunities for growth and helped them to enjoy their work.

There is **respect and trust for managers** for their commitment to making the business successful and ensuring that the customers are very satisfied so that they provide repeat business. People did believe that there was a **culture of openness and trust** through the Health and Safety Committee meetings, memos and day to day communications and the level of autonomy people had in their roles once they had been trained. There is action from feedback such as adjusting the frequency of meetings to be more effective use of time and introducing an effective e-communications system via tablets and Smart phones (after consultation on what people would prefer).

Areas for Development

Include coaching in the non-manager's competencies as everyone acts as a coach at some point even while they're learning they have expertise in some areas where they can help others.

Consider the possibility of merging the two sets for non- managers as people's roles are very responsible. Then for managers look at using additional competencies for inspirational leadership to support continuous improvement in best leadership and management practice. There are many ideas for the content of this on the web now – and through the CIPD web-site – in addition to the very good list from employees (as written in the section below).

3.2 Providing supportive management

Including: Clear core values relate to vision and strategy (1.7, 1.11, 1.13, 1.17, 1.19, 1.23, 1.24); Recruitment is fair, efficient and effective (3.6, 3.14, 3.19, 3.22, 3.27); L&M capabilities are defined, for now and future (4.4, 4.9); Managers are helped to acquire L&M capabilities (4.5, 4.6, 4.10, 4.11); L&M and business strategies are linked (4.7); Everyone encouraged to develop leadership skills (4.8, 4.12, 4.13); Managers are role models (5.5, 5.6, 5.9, 5.16, 5.22, 5.23); Managers are inspirational leaders (5.7, 5.14, 5.15); Efficient use of feedback (5.10, 5.13, 5.17, 5.20); Reward strategies link to business strategies (6.4, 6.6, 6.8, 6.9, 6.12, 6.15, 6.16, 6.18); Representative groups are consulted (6.5, 6.14); Motivation is understood (6.10); Success is celebrated (6.11, 6.17); Benefits strategy exceeds legal requirements (6.7); Colleague's achievements recognised (6.13, 6.19); Evaluation results in improvements (10.1, 10.2, 10.3); People's views on management improve (10.9, 10.13, 10.14)

Strengths

There is a **clear supportive and caring culture** here which is maintained through line manager role modelling and on-going informal coaching and mentoring which is very effective. The competencies are used at appraisal to talk through any issues that may need additional support and guidance. The competencies are a mix of knowledge, skills and behaviours. The behavioural ones cover the values – these include: Results focused, reliable, cares for others, quality output, exceeds expectations, high integrity, supports team work and enjoys work. These have been used for some time now and are well embedded.

People felt that **recruitment** within the company was fair and thorough. Advertising content has been changed so that it now doesn't include salary. There were more applicants when money was not included. The selection process involves interviews as well as assessment tests as appropriate. There is a 2 month trial period and an initial 6 month contract with monthly meetings to discuss progress. For engineers this includes feedback from the experienced engineers that new people have been working with. Recruitment normally involves one of the Directors and the Office Manager for the first round or two of interviews and includes the line manager for the second or third round.

New starters felt that the job itself was a very good match to the one advertised and explained at interview and had much better support than they had previously experienced.

Managers gave examples of coaching to **support** them **in gaining the management competencies** required. There is also access to accredited management courses such as SSSTS and NVQs.

The competencies had originally been taken on board through outside recommendation which had been **linked to best practice** at that time and designed to fit with the type of organisation and its needs.

People who have learnt their role are **encouraged to develop leadership capabilities** through working with less experienced people and coaching them on the job. The competencies of Care, Teamwork, Quality, Ultimate Service, Integrity and Fun all support people in understanding the expectations involved in supporting others to learn. There is a high level of autonomy for each person working here which is greatly appreciated.

The **management** team felt it important that they **demonstrated the competencies** that they expected from others which included working together as a team and sharing knowledge about new products or new ways of working. The culture is open and honest and once people have proved themselves capable they are trusted to run jobs on their own. People confirmed that knowledge is shared within and between teams through the Health and Safety

Committee meetings, memos, texts and also through regular phone discussions with people who have carried out a specific job before.

People had a wonderful definition of what makes an **inspirational leader** – this included: Being clear on what's important and able to communicate this effectively; enthusiastic; very good at building relationships through knowing people and their motivations; clear understanding of the job; listening and acting on feedback; trusting people; sharing knowledge and skills; having high standards; and keeping ahead of the industry. They felt that between all the managers that there was a good mix of these things.

For **reward and recognition** - in addition to the non-financial rewards given in section 1.1 there are also career structures that reward levels of skill and responsibility, overtime payments for evenings and weekends, working away allowances and a bonus scheme based on overall company performance. This isn't an assumed payment, everyone understands that is only paid if the company has done well. Everyone was clear on these financial rewards and knew that the company was taking on wider ranging work in order to maintain suitable work for the company and keep people in work and appreciated this. People are already very committed to continuous improvement and putting forward ideas for cost effectiveness and improving ways of working because of the overall support and recognition provided here.

Benefits include adding in an extra day's holiday per year after 5 years of service (up to a total of 25 days excluding bank holidays); medical insurance is provided for engineers; and mobile phones are provided for engineers to support communications out in the field. Other benefits link to the non-financial rewards given in section 1.1 particularly the high level of support for learning and development. There are plans in place to include Smart phones or tablets for people in the field to support better communications (as a result of people's feedback).

Managers discuss what people enjoy in their work to better **understand what motivates** them and aim as far as possible to provide opportunities to match. Examples of motivations include variety in the work, interesting problems to solve, continuous learning, working for a company with high standards and good support, a very friendly environment and good team spirit.

Successes are celebrated through sharing good customer feedback and new orders through the Health and Safety Committee meetings and memos and also through informal social events. There are also larger whole company social events as a more general celebration of the company's good work. Individual successes are congratulated informally through the line manager and where it applies to a good idea that has been taken on board this also goes through the Health and Safety Committee meeting.

The main method for people **recognising other's achievements** is through asking for advice and guidance. People know who has expertise on difference aspects of the business and they are able to talk to them directly or phone them for their guidance. This method is regularly used day to day and everyone is willing to support others in this way and feels valued by it.

Improvements in people management and development as a result of evaluation include greater multiskilling within the office to provide more job interest and better cover; planned introduction of better e-communications in the field through tablets/smart phones; and wider use of SSSTS accreditation so that there is flexibility for client jobs.

Managers were able to give **examples in improvements to their own people management** and development practice and these included adjusting their coaching practice to give people more opportunities to try things early on and to give them low risk jobs so that they could work independently and learn more quickly from trying things even if they make the odd mistake. Other examples include more informal discussions to ensure that the proper support is available for people's needs and more frequent communications on ensuring that people work on the specified job and don't over supply which reduces margins.

The check on **people's view of how they are managed and developed** comes through day to day discussion and more formally through the Health and Safety Committee meetings. People felt that managers were committed to improving the way that they manage people and gave examples of changes as a result of their feedback such as broadening job roles which has helped with personal development, a more interesting job and providing cover; changing roles to try a different area and being able to stay in that role if it suits both parties; and listening to equipment needs and finding agreed solutions (e.g. tablets).

Areas for Development

Although people did give feedback that managers were very good it is worth continuing to improve and strive for everyone to become inspirational. Use the inspirational management list given by people to add to the management appraisal scoring and enable development of consistent best practice. The CIPD web-site would also help here on what to include.

Consider using a questionnaire to gain feedback against these best practice requirements to give a source of ideas for improvement in management practice. Also consider using personality profiling such as Clarity 4D to gain further ideas for improvement.

Appendix 1 – Continuous Improvement Plan

Business Issue - What	Suggested Actions - How	Potential Benefit - Why	Priority - When	Solutions - Who
Communi-cations	Although there is good work here on social responsibility and some areas are a key part of the strategy (such as looking at the new refrigerant), and there is a clear overall Environmental Policy with linked actions – there wasn't a clear understanding of the overall picture as yet to enable the company to meet the requirements that Social Responsibility is at the heart of the culture for managers and people. Consider looking at the Global Reporting Framework for Sustainability to help you promote the range of actions that you cover to all.	Greater understanding of progress and priorities by all employees which could be used for better customer relations also.	Medium term	Internal expertise with IIP specialist support if needed
	There were a few issues regarding information about client's equipment and history which is kept in a file on the client's premises. If work is carried out at weekends then access to this file can be difficult. Engineers are looking forward to easier access to files through tablets which will solve this problem. The introduction of tablets was also being hailed as the solution for better communications on client information for installation and commissioning to speed up the paperwork side of the role.	Greater efficiency and effectiveness	Short term	Internal expertise
	There were requests for service meetings to help share knowledge and information across this team. There were also requests from this team for more information on the whole week's jobs so that they could plan their home life more effectively. Currently this is done daily.	Greater employee engagement through more regular communications	Short term	Internal expertise
Supportive leadership and management	Include coaching in the non-manager's competencies as everyone acts as a coach at some point even while they're learning they have expertise in some areas where they can help others.	To ensure consistent coaching practice	Short term	Internal expertise
	Consider the possibility of merging the two sets of expectations for non-managers and managers as people's roles are very responsible. Then for managers look at using additional competencies for inspirational leadership. There are many ideas for the content of this on the web now – and through the CIPD web-site – in addition to the very good list from employees in the detailed feedback.	To maintain continuous improvement in leadership and management practice	Medium term	Internal expertise with IIP support if needed

Business Issue - What	Suggested Actions - How	Potential Benefit - Why	Priority - When	Solutions - Who
	Consider using a questionnaire to gain feedback against these best practice requirements to give a source of ideas for improvement in management practice. Also consider using personality profiling such as Clarity 4D to gain further ideas for improvement.	As above	Medium term	As above
	Consider a broader content of mentoring to include commercial awareness to enable everyone's greater understanding of the business.	Better understanding of rationale behind the priorities and broader ideas for improvement	Medium term	Internal expertise
	Consider a rolling review of people management and development strategies.	To ensure cost-effectiveness and ongoing improvements	Medium term	Internal expertise
	Ensure that there are effective succession plans in place for the people considering cutting their hours or retiring.	Effective cover and good development opportunities for others	Short term	Internal expertise
Preparation for IIP6	Read through the new framework and consider which areas would support business improvement for Ceilite. Make use of the 18 month meeting to look at this in more depth. There are also local workshops to support this transition if you'd prefer a group approach.	Continuous improvement through using the new best practice framework	Medium term	Internal expertise with IIP specialist support

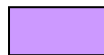## Appendix 2 – Assessment results summary – Gold Award Success

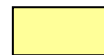The Investors in People Framework

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	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	x	✓	✓	✓	✓	✓	✓	x				
2	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓													
3	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
4	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓																
5	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓					
6	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓												
7	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓												
8	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓											
9	✓	✓	✓	✓	✓	✓	✓	x	x	✓	✓	✓	✓	✓															
10	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓														

The number of evidence requirements met is **192 which is well over the 165 required for the Gold Award**

Key:

The Core Investors in People Standard

Your Choice from the Investors in People Framework

Not part of the Investors in People Framework

INVESTORS IN PEOPLE | Central England

In the table on the next page the green highlight shows that the topic is met; a yellow highlight shows it is met with a suggestion for improvement and the red highlight shows the evidence requirements that are not met.

	1	2	3	4	5	6	7	8	9	10
The Standard Good Practice	Vision Purpose Strategy Plan Involving people	Learning needs Plans & resources	Encouraging contribution Equality of opportunity for development and support	Clarify the leadership and management capabilities needed	Managers are effective and can describe how	Recognising and valuing contribution	Ownership and responsibility is encouraged Involvement in decision making	People's learning and development needs are met	Investment in learning can be quantified Impact can be demonstrated	Evaluation results in improved people strategies
Your Choice Best Practice	Core values **3** (7,13,19) Use of KPIs **3** (9,15,21) Social responsibility **3** (10,16,22) Involving people and Stakeholders **3** (8,14,20) Values at the heart of strategy **4** (11,17,23,24) Social responsibility at heart of culture **3** (12,18,25)	Learning and development strategy builds capability **4** (5,8,12,14) Plans take account of learning styles **2** (10,15) People help make decisions about their own & team learning) **3** (9,13,16) Learning and development is innovative and flexible **1** (6) A culture of continuous learning **3** (7,11,17)	Recruitment process is efficient and effective **5** (6,14,19,22, 27) Diverse and talented workforce is created **6** (7,11,12,15,23,28) Work life balance strategy meets people's needs **6** (8,13,16,21, 24,29) Constructive feedback is valued **3** (9,17,25) Structure makes the most of peoples talents **4** (10,18,20,26)	L&M capabilities for are defined for the future **2** (4,9) Review and support managers to acquire capabilities **4** (5,6,10,11) L&M strategy links to business strategy and takes account of external good practice **1** (7) Everyone encouraged to develop leadership capabilities **3** (8,12,13)	Managers as role models **6** (5,6,9,16,22, 23) Coaching is part of the culture **4** (8,12,19,25) People are helped to develop their careers **2** (11,18) Culture of openness and trust **2** (21,24) Top Managers inspirational leaders **3** (7,14,15) Efficient use of feedback **4** (10,13,17,20)	Reward and recognition strategies linked to business strategy **8** (4,6,8,9,12,15,16, 18) Representative groups are consulted **2** (5,14) What motivates people is Understood **1** (10) Success is celebrated **2** (11,17) Benefits strategy beyond legal requirements **1** (7) Colleagues achievements are recognised **2** (13,19)	Effective consultation and involvement **5** (4,6,7,13,17) Support and trust people to make decisions **4** (9,12,14,15) Knowledge and information are shared **2** (5,10) People are committed to success **1** (16) A culture of continuous improvement **2** (8,11) People can challenge the way things work **1** (18) People have a sense of ownership and pride **1** (19)	L&D Resources used effectively **1** (4) Learning is an everyday activity and valued **6** (8,11,13,15,16,18) Innovative and flexible of approach to L&D **2** (5,14) Opportunity to achieve full potential **1** (9) Learning is valued and celebrated and is an everyday activity **3** (6,10,17) Mentoring is used **2** (7,20) Support for personal development **2** (12,19)	Contribution of people strategies is measured and evaluated **2** (6,10) Impact on KPIs can be described **1** (7) Performance improves as a result **3** (11,13,14) Career Prospects improve **1** (12) Flexible and effective approaches to measuring return on investment **1** (8) Return on investment in people is reported to stakeholders **1** (9)	Self review and information from external review are used **5** (4,5,10,11,12) Effective feedback methods used to understand peoples views **2** (6,7) Internal and external benchmarking is used **1** (8) People's views of how they are managed improves **3** (9,13,14) People believe this is a great place to work **1** (15)

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