

IN CONFIDENCE

QUALITY
SOUTH WEST

Raising Performance
Standards

INVESTORS IN PEOPLE REVIEW REPORT

For

Dorchester Opportunity Group

ASSESSOR: Derek Johnson

DATE: 17th July 2007



CONTENTS

1. Outcome
2. Strengths and Areas of Good Practice
3. Feedback against Agreed Objectives
4. Potential for Further Development and Action Plan
5. Findings against each Principle of the Standard

Review Plan

1. OUTCOME

Dorchester Opportunity Group continues to comply with the requirements of the Investors in People Standard. I am pleased to confirm that recognition is therefore maintained as from 16th July 2007.

2. STRENGTHS AND AREAS OF GOOD PRACTICE

- The keyword in this organisation's name is 'opportunity' and it delivers this in abundance – for the children who attend, the families of the children, and the staff/trustees/volunteers. It provides opportunities for everyone to develop to their full potential and to contribute to the Group's achievements. It is a creed that is at the very heart of the Group's 'raison d'etre'.
- The Group is very much an inclusive organisation in every sense. Everyone is kept fully informed by meetings, minutes of meetings, and by open discussion. No one is excluded and there is a very strong team ethos. There is complete sharing and ownership of the vision for the Group and its future.
- People are prepared to learn from one another, not only within the Group but also by visiting other similar organisations whose experiences and facilities help to support the Group's planning for the future.
- The degree of commitment to the Group is no better demonstrated than by the willingness of people being prepared to give their time freely, sometimes because of past and current family connections with the services provided, and also by long standing professional commitments to provide for the development of children whatever their personal circumstances. Paid staff also go that extra mile, and no-one's contributions go unrecognised nor without being valued.
- An organisation that is very dependent on securing funding support from whichever source is available relies on the ability to identify such sources and to be able to utilise contacts and networks to good effect. The Group is ably served from the highest level within the organisation to "know someone who might be able to help" and also by researching the internet.
- A highlight that emerged from the interviews was the use made of Fairthorne Manor situated on the River Hamble near Southampton. This facility serves as a weekend retreat where families can gain some respite whilst their children are cared for by the Group's staff who also stay at the Manor. This is fully funded by the Group and would appear to be a valuable therapeutic and developmental facility valued by all.

3. FEEDBACK AGAINST AGREED OBJECTIVES

- Since the first assessment, the induction procedure has been reviewed and strengthened in its approach by being more interactive with new members of the team.
- Volunteers now have the opportunity to build upon their experiences and develop their skills including accessing appropriate NVOs.

- There appears to be greater flexibility in reviewing staff performance with reviews being carried out on a less rigid timetable but still fulfilling the need to give feedback to people at an appropriate time.

4. POTENTIAL FOR FURTHER DEVELOPMENT

- The Group is on the verge of an exciting new development if plans, and funding, are agreed in transferring from the accommodation currently occupied to a purpose-built facility on nearby grounds. This is part of the vision for the Group, and the commitment and energy of the senior trustees has to be admired. However, if (hopefully 'when') the new project goes ahead, there will be a need for some new/additional support. It would be not too early to start considering succession planning now to identify potential new players in the Group.
- The turnover of the Group has now grown to the point where the Charity Commissioners require financial accounts prepared by an appropriately qualified person (e.g. a Chartered Accountant). Taking this continuing growth into consideration as well of the potential impact of the new project, it would be advisable to consider introducing more detailed monthly management accounts for consideration by the Trustees and the Senior Management Team.
- The staff appraisal system is uniform for all and incorporates a scoring system. Whilst it is used in an extremely motivating way for most staff, there perhaps is a need for something different for the senior managers. It might be worthwhile considering reviews of senior staff by way of reference to the leadership and management qualities required of such staff. The resources identified below may be helpful in redesigning the appraisal system for senior managers.
- There has been a recent expansion into outreach work whereby members of staff spend time in the homes of families whose children attend the Group's facilities. Whilst risk assessments are carried out on all other activities, outreach work has not yet been assessed. This needs to be addressed as soon as possible.
- Surveys are carried out about the quality of the service for families, and it may now be worth considering carrying out a survey to be completed by all those involved with the Group's activities to ensure that their views, perceptions and suggestions are logged.

You might want to look at Quality South West's own website to maintain a view of the developments around the Investors in People Standard in the region:

<http://www.qualitysouthwest.co.uk/>. (The Leadership and Management/Recruitment and Selection/Work Life Balance Models may be of particular interest to you.)

With regard to Leadership and Management, visit the Institute of Leadership and Management at <http://i-l-m.com>. <http://www.ashridge.org.uk/> includes access to some interesting reports as well as E-Learning resources, whilst <http://www.leadershipsouthwest.com/> will provide you with lots of information from a more local source.

You may find it beneficial to contact your local Train to Gain team for a review of your skills training requirements in the context of your business needs. It is a free and impartial assessment that will give you access to a wide range of training provision, some of which may be funded. Please ring 08456 047047 or visit www.traintogain.gov.uk.

The basis of an Action Plan has been prepared on the next page to help you move forward and address the development areas identified during this visit.

CONTINUOUS IMPROVEMENT PLAN

The first column of this Plan has been completed for you as a basis for moving forward on the feedback suggestions discussed.

Suggestions for further development	Action Agreed	Responsibility	Date
Consider succession planning in order to identify the qualities, skills and experience of the people who will need to be recruited to help with the new development.			
Consider introducing more formal monthly management accounting reporting for submission to the Trustees and Senior Management Team.			
Explore alternative appraisal systems for senior managers with a particular focus on leadership and management skills required for such positions.			
Carry out risk assessments of outreach work.			
Consider carrying out a Dorchester Opportunity Group people survey.			

Target date for the next visit/contact by the assessor: January 2010

Date for next Investors in People Review: June/July 2010

5. FINDINGS AGAINST EACH PRINCIPLE OF THE STANDARD

An Investor in People develops effective strategies to improve the performance of the organisation through its people.

There is no doubt as to the vision and purpose of Dorchester Opportunity Group. It has grown considerably since its inception and is now at another milestone in its relatively short history with its plans to move to purpose built premises. The strategy is supported by an Operational Plan with objectives for the current year with the longer-term vision expressed in the form of a project plan. People are totally aware of the plans and participate in its development through series of regular meetings and visits to other organisations. Through staff reviews and team meetings targets are set to meet the main objectives of providing pre-school education and development in a safe and caring environment with support for families as well.

In order to deliver these objectives, it is recognised that staff need to be qualified in Early Years practices together with the range of skills needed for addressing the requirements for children with special needs. Management, governance and information technology skills have also been identified. The plans for meeting these needs include accessing NVQ courses, degree studies, and ad hoc course for specific areas. Evaluation of this investment is through measuring the progress of children through their Individual Educational Plans and the level of success in managing and developing the Group. People were able to confirm that their development needs were identified during appointment/induction processes, observations and during appraisals. With their clear understanding of the purpose of the Group, people are fully aware of what their learning and development should achieve for them and the Group.

Inclusivity is at the very heart of the Group – “like the lettering through seaside rock”. There is, of course, an equal opportunities policy, and managers with their variety of skills in the special needs areas are quick to recognise the different needs of people and were able to describe how they met those needs. People were very appreciative of the support and encouragement that they receive in the various roles, and there were many examples of how they helped colleagues and contributed ideas during meetings, particularly in dealing with the needs of specific children.

Many of the skills and behaviours for managers as described by senior managers are those that are natural inherent attributes such as humanity, patience, good role models, caring and supportive. A sound knowledge of child development was considered essential, as was the ability to listen to people and to have a sense of humour. Leadership and management development feature in the training and development plans for the organisation as well as

learning from one another. People added to this list with skills of being able to “motivate me”, being approachable and a good communicator together with delivering on promises.

An Investor in People takes effective action to improve the performance of the organisation through its people.

As indicated above, managers considered that much of their effectiveness comes from setting a good example, listening to and informing staff. This is achieved through observations and regular appraisals. These involve a self-assessment against a series of criteria related to the job role using a scoring system. It is perhaps a tribute to the managers conducting these reviews that staff found them to be motivational particularly when the manager rated the person concerned higher than they perceived and also in giving praise for the achievements accomplished.

Giving praise and expressions of thanks were mentioned by managers as ways in which they show their appreciation of the contributions of staff. Being promoted and having celebratory events, usually at the end of terms or festive occasions were referred to. There is a tremendous degree of job satisfaction stemming not just from the excellent way in which people are treated by the organisation but also from the reactions of children and their families. Gifts of chocolates and homemade cakes are apparently a regular feature in the staff room!

The high degree of staff participation in planning is clearly an excellent way of ensuring the involvement and ownership by the staff in the activities of the Group. Weekly team meetings address the more specific performance areas with discussions on the best way to meet the needs of the children in their care. By being involved in and taking responsibility for the development of children ensures that people feel encouraged to improve performance at all levels.

Managers described the planning and facilitating of people’s learning and development including the circulation of various programmes that are available, and encouraging and supporting people’s attendance on them. This was confirmed by people who described how undertaking NVQs at levels 2 and 3 had helped them in providing support for children together with specialist training in behaviour management, signing, and Picture Exchange Communication System (PECS) that helped with specific needs of children. New staff undertake a planned induction programme that is checked in relation to what has been learned. Induction is found to be thorough and helpful for people settling into their new job role.

An Investor in People can demonstrate the impact of its investment in people on the performance of the organisation.

Top managers were able to be specific about the Group's investment of money for training including direct costs, amounts built into funding applications and the cost of the weekend retreats to Fairthorne Manor. In addition they are aware of the time involved in attending training events and the resources maintained within the premises. There is absolute acknowledgement that the Group could not have got to where it is today without having a skilled, motivated, professional and committed workforce. The growth from a limited service for fewer than 10 children to a level of over 40 children plus families and plus outreach work is a demonstration of how the service has improved. Given the experience of time, there is a good understanding of what development works and what is less effective or can be provided by alternative means. People gave examples of how they are better equipped to deal with autism and behaviour issues as well as using the PEC system and other strategies to support children with special needs and their families.

There is recognition of how the investment in the development of staff has helped in the management of staff by introducing systems of performance review and by building a professional team capable of motivating and supporting staff. Managers also confirmed how their development had helped to make them to be more effective leaders and managers. People endorsed this by referring to managers being inspirational, fair, approachable and good at listening to them.

This is an organisation that has been prepared to take on the new challenges ahead of them should their plans be approved. This is in no small measure a reflection of the vision that senior people had at the outset, and it is a tribute to their commitment, on a voluntary basis, to the needs of children and families that the Group serves.

IN CONFIDENCE

QUALITY
SOUTH WEST
Raising Performance
Standards

INVESTORS IN PEOPLE REVIEW PLAN

For

Dorchester Opportunity Group

ASSESSOR: Derek Johnson



BACKGROUND INFORMATION

This is the first review of Dorchester Opportunity Group (The Group) following its successful recognition on 30th July 2004.

The Group provides free pre-school education for young people with special needs in South and West Dorset along with support and education for the families of these children. Funding for The Group is heavily reliant on accessing sources such as the Lottery and fund raising activities such as auctions of donated items from some well-known celebrities.

The nature of the service provided requires a high staffing level in relation to the number of children cared for, and it is a reflection of the value of this facility that parents of children who formerly attended The Group continue to play an active role in its running on a voluntary basis. As it is, The Group is supported by 7 volunteers (some of whom also serve as Committee members) in addition to another 6 people who hold various positions of responsibility on an unpaid basis.

Since the original recognition, The Group has expanded its services by the addition of 2 new sessions as well as a Tea Club once a week, increased Play Days to one a month, and now offers outreach support for families at weekends. They are also working in partnership with Dorset Sure Start to become a Children's Centre in 2008.

AGREED OBJECTIVES

- To confirm that Dorchester Opportunity Group continues to meet the requirements of the Standard for recognition as an Investor in People.
- To provide feedback on opportunities for further improvement and continuous development.
- To review the actions taken on the suggestions for improvement offered during the previous visit, namely:
 - Review the strengthening of induction procedures.
 - Expanding the development opportunities for volunteers.
 - Ensuring that reviews of staff are conducted within 3 months of appointment.

SAMPLE DETAILS

Grade/Function of Employee (and any other People 'in scope')	Number Employed	Number Interviewed
Managers (employed)	2	2
Deputies	2	2
Play Workers	2	2
Play Assistants	4	2
(Trustee Manager/Chairman/Treasurer)	(3)	(2)
(Committee Members/Volunteers)	(10)	(2)
TOTALS	10 + (13)	8 + (4)
		= 80% (52%)

Category of Employee	Number Employed	Number Interviewed
FULL TIME	1	1
PART TIME	9	7
MALE	1	1
FEMALE	9	7
RECENT STARTERS	2	2
REPRESENTATIVES		
Unpaid Voluntary Workers	(13)	(4)

NUMBERS INTERVIEWED BY EACH METHOD:	Individuals	8 + (4)
	Pairs	
	Groups	
	By Telephone	
TOTAL NUMBER OF SITES:	1	NUMBER OF SITES COVERED: 1

ADDITIONAL NOTES

ON SITE DATE:	16 th July 2007	REPORT SENT TO CLIENT BY:	25 th July 2007
TOTAL NUMBER OF DAYS:	1.5	TOTAL COST:	£825.00 + VAT

The national rate for Investors in People assessments and reviews is £750 per day (plus VAT). Quality South West is able to provide a subsidy of £200 per day. Any travel expenses over 100 miles per day (charged at 40p per mile) and any other agreed expenses incurred will be invoiced directly to you by your assessor.

We agree to the costs as detailed above and have read and understood the terms and conditions contained within your 'Client's Guide to the Assessment/Review Process'.

Signed:

Date: