

Commercial in Confidence

INVESTORS IN PEOPLE

REVIEW REPORT

for

NSA

'Helping communities work together'

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1) Introduction

This report has been produced following the Investors in People Review of NSA carried out on behalf of Investors in People Wales. The report reflects on the findings of the Review and highlights areas of good practice identified, in addition to those areas recommended for further development.

NSA is a member led, community based regeneration organisation that is a company limited by guarantee. It is governed by a Board of Directors, which has amalgamated with the NSA Communities First Partnership.

Its area of benefit is Sandfields East, West and Aberavon in the County Borough of Neath and Port Talbot. Its area of operation also includes Swansea Bay, Waterfront and the Western Valleys.

NSA cultivates community enterprise. Staff work with volunteers and project participants to help improve quality of life. Great focus is placed on supporting people beginning their journey to work, training or education.

Since the last review managers have addressed all areas recommended for continuous improvement. There have been some changes to the organisational structure and line management responsibilities. There has also been a significant intake of new staff. The most recent recruits have been taken on to work at NSA, funded by the Future Jobs fund.

Last review date: 28.04.08

The review process consists of the following activities:

Planning the Review in line with organisational objectives / priorities.

Arranging the on site interviews.

Evidence gathering and analysis.

Feedback and reporting.

2) Review Priorities

As a result of discussion at the planning stage, the Review will provide feedback on the appropriate aspects of the Investors in People Standard that relate to the organisation's Critical Success Factors listed below:

Financial

Financial sustainability based on social enterprise.

Community Engagement

Engagement with all aspects of the community through mutual support.

Process / delivery

Provide environmentally sustainable facilities and services that meet community needs.

People / learning

Develop internal and external stakeholders and systems to take NSA's mission forward.

3) Findings against Priorities / Objectives

The key objective was to determine the organisation's current status against the Core Investors in People Standard. The Assessor took time to discuss the organisation's current priorities as detailed above. Six additional indicators from the Framework were identified for inclusion in the Review, these are:

- 1.11 Top managers make sure the core values are at the heart of the way the organisation operates.
- 1.12 Top managers can describe how social responsibility is part of the culture of the organisation.
- 1.16 Managers can describe the organisation's social responsibilities and what this means to the way they are expected to manage.
- 1.17 Managers can describe how they make sure social responsibility is part of the culture of the organisation.
- 1.23 People believe the core values are at the heart of the way the organisation operates.
- 1.24 People believe in and share the organisation's vision and values.

Findings are presented against the 10 indicators of the Standard and links are made to the additional six evidence requirements within the report. Evidence for the additional requirements has been included in blue. In order to facilitate continuous improvement in line with organisational priorities, the suggestions in Section 5 have been linked to the organisation's Critical Success Factors as stated in Section 2.

PLAN: Developing Strategies to Improve the Performance of the Organisation

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

NSA's managers drive excellence in the performance of all staff by providing a strong vision and a well-planned organisational strategy which people connect to and believe in.

This is an organisation that base their activities on a set of clearly defined Core Values, which include: Public Service, Leadership, Selflessness, Integrity, Objectivity, Honesty, Accountability and Stewardship. People were very confident to talk about the values of NSA and all feel that managers lead and develop them in line with a strong belief system, focused on enhancing the lives of the beneficiaries. The understanding and personal connection to the values has recently been strengthened by involving staff in an activity, where they were asked to consider what NSAs values meant to them. During interviews the 'Selflessness' value was the one people seemed to really understand the most. People were able to give plenty of examples of what this meant to their everyday work, such as payroll giving, helping with the Beach Festival and contributing to other projects. The defined Core Values drive effective Board and Partnership working and a similar activity to the one carried out with staff, will be used at the forthcoming Stakeholder day to encourage members to think about the Core Values and what they

mean to their contribution to NSA. Some examples of how people feel they demonstrate the Core Values include:

- Leadership – giving advice to small groups on how to apply for funding and how to effectively spend it.
- Honesty when marking work.

Placing the Core Values at the heart of NSA's strategy has resulted in the following:

- Recognition of personal effectiveness.
- High levels of loyalty to NSA.
- Common understanding of organisational goals.
- Strong norms about working hard and caring.
- Pride in the company and the work it does.
- Understanding about job expectations.
- High levels of effective teamwork.

Typical comments:

“If you are delivering the product properly you have to live all the values”

“Through the Core Values we are integrated within all aspects of NSA”

“The Values are about what we do, they are our company”

“If we stick to the Values we give people a better chance to learn and progress”

“Stakeholder days make sure everyone understands the whole concept of what NSA stands for”

The process for involving staff in the business planning process continues to evolve. Views and opinions are sought via Staff Meetings, Team Meetings, Appraisals, Supervisions and at Stakeholder days. The annual Business Plan is a comprehensive document, which sets out both quantitative and qualitative targets. Work has been commissioned this year to look at improving the business plan, to develop the use of Critical Success Factors and to start to use a Balanced Score Card approach. A task group, with the aim of ensuring all their Critical Success Factors received equal attention, developed the Balanced Score Card. **Using this approach, Managers have come to realise that a greater amount of people's time will be focused on their community engagement, as that is what the organisation is all about.**

Directly linked to the business plan objectives, SMARTER Workplans are developed at individual and team / project level. In addition to the overall business plan, presented in a printed gloss format and circulated to staff, funders and stakeholders, managers have an operational plan called NSA Priorities. This document is updated quarterly and targets are aligned the statistical and reporting requirements of WAG and WEFO. Managers see the vital role they play in monitoring and reporting project progress against targets set out in the NSA priorities document.

Managers described how extensive consultation takes place throughout the organisation, contributing significantly to the Business Plan and NSA Priorities. Discussion is ongoing and fluid; managers have a very responsive way of involving staff in business direction. Managers also work in partnership with other organisations such as WGADA, Shaw Trust and Want to Work.

Once the Business Plan is finalised, all staff have access to a copy and briefings are arranged to update staff of current priorities. The Business Plan and contained Critical Success Factors are discussed amongst teams / projects and on a one to one basis at Appraisals and Supervisions, to ensure people understand their alignment and contribution to team and organisational goals. As a result of their involvement in planning, staff interviewed were able to explain the priorities of their team and the organisation. All staff are very focused on the needs of the community and those people who benefit from the services they provide. All staff submit a weekly report summarising their achievements, meetings attended etc. and to state their plans for the week ahead. This really helps people to stay connected with the priorities of the organisation and to continually realign their activities with the organisation as a whole.

Community engagement and social responsibility is the heart of this dynamic organisation, managers recognise the fundamental need to understand the community and to put partnership working into practice.

Corporate Social Responsibility [CSR] involves the management of the organisation's impact on its stakeholders, the environment and the community in which it operates. These considerations have an impact on the decisions that NSA makes as it performs its day-to-day functions and plans future developments.

The following good practice in CSR was noted:

- Talk to relevant community and regulatory bodies about possible partnership arrangements.
- Consult with their stakeholders about their concerns and what they would like to see the organisation work towards.
- Obtain buy-in from all staff.
- Make beneficiaries aware of what they are intending to achieve.

“I love the work we do for the community – you feel like you are making a difference”

“NSA is all about regeneration of the community”

“Its all in the community interest”

“All contact with beneficiaries is the point social responsibility is discharged”

“Awareness of social responsibility helps us – it enables staff in contact with beneficiaries to know it is their duty to help; It is the quality of the contact that is important”

“As a manager we need to understand the community needs and put into practice partnership working”

“Everything is tailored to CSR”

“I have learnt so much about how we support the community and how we work with our partner organisations”

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

Managers described how there are a wide variety of planned learning interventions linked to NSA's priorities. A form has been designed to ensure individuals prior to submitting training requests, think out measurable outcomes for each intervention. As staff are fully engaged in business activities and team planning and they have a good

understanding of how the training and development they are involved in improves their performance and the impact it has on the organisation.

“Now all our learning is linked back to the Critical Success Factors”

There is an organisational learning plan, which summarises the main learning and development needs linked to specific business development objectives. Measurable objectives and impact / success criteria are identified for each learning intervention.

One Manager explained how she will be attending a soft skills evaluation course. She will be attending, as one of STRIDES targets is to show the progression of people’s soft skills. This needs to be measured and reported to WEFO.

Managers are aware of their development needs and opportunities, which have been discussed informally and through the Appraisal and Supervision processes. There is excellent support for Managers through exposure to development opportunities, with the full support of the Chief Executive, Board and Partnership.

Managers interviewed felt that access to development opportunities was very good. They felt really motivated by the approach taken to developing their skills and abilities and fully understand the range of development opportunities available such as meetings, conferences, involvement in business planning, shadowing and coaching. In the last three years a greater emphasis has been placed on seeking out internal expertise and planning a more structured way of utilising people’s skills.

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

The following strategies are in place to create an environment where everyone is encouraged to contribute ideas to improve their own and others’ performance:

- Appraisals for all staff.
- Supervision for all staff.
- Close team working.
- In house training.
- Comprehensive suite of meetings, all with terms of reference (SMT, MFTM, BMT, CMT, OSTM, STRIDES / NSA Works Management Group).

There were many examples of how staff work together and help each other to learn and develop. Staff at NSA appear to really value and respect each other and are open to receiving feedback.

Managers recognise the different needs of all the staff and endeavor to ensure an environment is created where everyone can develop. Every effort is made to ensure all staff receive the necessary information and development opportunities to fulfill their job role and fully contribute to achieving the corporate vision and aims.

It transpires, that through meaningful and constructive discussions with their managers, people believe they are genuinely committed to making sure everyone has appropriate and fair access to the support they need as an individual.

“We have a cracking team – it is all about the support”

“People feel a sense of responsibility to help each other – people will go that extra mile”

“There is always someone there for me”

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

Senior Managers are clearly committed to achieving effective leadership and management. They lead by being very hands on in the company, by continually developing themselves and by maintaining a close team working within a caring environment. In turn people really believe they are valued and are committed to the vision of NSA.

Desired leadership and management behaviour is promoted through in-house training, frequent meetings and Supervision. Senior Managers are fully committed to developing the leadership skills of all employees within NSA to ensure the organisation continues to provide exemplary service to its beneficiaries.

The core competences for leadership and management have been revised in line with, the headings used in last year's 360 degree appraisal. The 360 degree appraisal had its merits, but Senior Managers felt that the Appraisal and Supervision system they have developed, gives greater opportunity for more meaningful and open, two way feedback.

Managers did recognise that the competence headings are quite general, but explained how Senior Managers help them to realise what is expected under each one. They recognise that the competences are there to help them develop in line with the business plan.

Managers are now working in a more collaborative way and fully understand what is going on in each project. Each manager produces a monthly report, which is discussed at meetings.

“We now have a more collaborative management approach, our Project targets link directly to our Critical Success Factors”

“We now really understand our role and how it fits into the organisation”

DO: Taking Action to Improve the Performance of the Organisation.

5. Managers are effective in leading, managing and developing people.

All Managers have Supervision and Appraisal which is aimed at encouraging them to achieve the standard required of them as a leader. Through a well developed system and continually monitored system, all managers receive regular feedback on their performance.

The performance of management is reviewed and discussed collectively at meetings. This provides an ideal opportunity for managers to share knowledge and experience and provide constructive feedback to one another. A skills audit was recently undertaken with the Management Team. This required all managers to consider the formal qualifications and experience they had against each of the Critical Success Factors.

Managers are proud of their individual leadership qualities, and their professional attitude. Managers at all levels explained how they believe they are effective managers of people. They all feel they work well with staff and provide strong inspiring leadership.

Managers understand the importance of their own professional development and cited the following development currently being undertaken by members of the management team or having recently been undertaken:

- ILM Level 3 in Management
- NVQ Level 3 in Management
- Masters Degree in Community Regeneration
- PTLS course
- Internal Verifier (V1) Award
- NVQ Level 4 in Advice and Guidance
- NEBOSH Level 5.

More informal development includes:

- Shadowing appraisal sessions in order to conduct them.
- Attending meetings.
- Carrying out research.
- Visiting other Projects.

Managers give regular feedback to their staff through team meetings, Stakeholder days and more formally at Appraisals and Supervision. The Appraisal process has recently been reviewed and developed using a model provided by Peninsula Business Services. As part of the review, core competences were drawn up and job descriptions updated. A summative report on the NSA staff appraisals was drawn up to provide an overview of everyone's key targets and learning and development needs.

People explained the ways in which they believe their managers are effective. Their views were consistent with those described by managers. In particular, they talked about the managers':

- Approachability.
- Dedication.
- Involvement.

- Openness to new ideas.
- The way they listen.
- Caring attitude.

Typical comments included:

“He is very receptive to ideas and opinions”

“They give you courage and belief to push the boundaries”

“She is strategic but she really knows what we are doing”

“They will all get stuck in with tasks such as covering a class, answering the phone”

“They care about the staff and the community”

“His leadership is brilliant”

“She is always willing to listen”

“She has very good knowledge and understanding”

6. People’s contribution to the organisation is recognised and valued.

Managers at NSA are very close to their staff and use frequent and informal strategies for rewarding and recognising them for their efforts and contributions.

Managers view praise as a strong and powerful tool for motivating people within NSA. This occurs formally and informally. Managers frequently take the time to stop work and talk to an individual and praise them for a particular achievement or contribution.

Many people talked about how energised and motivated praise makes them feel and how it helps them to see the direct part they play in the success of NSA.

Other strategies for reward and recognition discussed during interviews include:

- Awards ceremonies where certificates are issued.
- Publication of achievements in Making Waves, published and distributed three times a year.
- Flexibility around home and personal needs.
- Everyone’s birthday is recognised with a card and present.
- During the world cup, staff were able to watch afternoon games and work back through flexi time.
- Team building events such as a Treasure Hunt in Cardiff Bay.

Very recently NSA have started to publish e-zine, a newsletter distributed to the Board, Partnership, Staff and Stakeholders. Within this, staff are acknowledged and praised appropriately and team successes shared. It really provides a snapshot of what is currently going on in NSA. The format and content was introduced at the last Stakeholder Day and everyone was asked for their feedback.

People seem to really value the opportunity to work for NSA and all recognise the contribution they make to its success. [The culture is strong and the Core Values are fully embedded and accepted.](#) As a result, all those interviewed were able to give examples of the positive part they play in the organisation. Examples include:

- Digital Inclusion in the Community.

- Generating income for NSA.
- Securing new contracts.
- Success of new PV4Free project.
- Helping people to achieve qualifications.
- Helping people into employment.

“The community really does thank us”

“Staff know what each project needs and we deliver”

“Through adversities you really see how well we work together. For example, following a break in and more specifically the Lido fire, you see how everyone pulls together. This is the stuff you don’t see on paper – just how proud we all are and how much we enjoy working for NSA”

There is clearly a lot of pride in people’s own achievements and that of others and many people talked about recognition such as:

- NIACE Lifelong learner of the year award (NSA has had three winners over the years).
- Achievement of the Green Dragon Award.
- Achievement of the Tidy Towns Award.

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

Managers explained that they promote a sense of ownership and responsibility by encouraging people to be involved in the decision-making processes within the organisation. There is a full suite of meetings which involve everyone appropriately. All staff are encouraged to attend at least one Operational Staff Team Meeting [OSTM]. Task groups are frequently used to develop systems and strategies. For example, the Appraisal process was reviewed and developed by a task group. This approach helps people from across projects to come together to work on improvements to the way NSA operates.

NSA is moving away from its reliance on funding to becoming more self-sustaining and generating new streams of income. Managers are encouraging staff to consider how their Project and the work they do may generate income for the organisation. All staff talked very positively about this shift in direction and were very enthusiastic about the ideas they had contributed.

All those interviewed acknowledged how they are encouraged to be involved in decision-making at team / project and organisational level. For example, constructive discussions have taken place around sourcing protective clothing. As a result of this discussion at an OSTM, a considerable amount of funding has been sourced to purchase the required clothing.

“We had a Systems Analysis day so that we could discuss our ideas on what we could improve. As an organisation we always try to make things better”

“We were asked for our ideas on ways of using Rhodes Avenue to reduce waiting times for courses”

“Following our PTLLS training we gave our ideas on lesson planning and setting ground rules in the classroom”

As well as involvement in group and team decisions, people are very clear about the extent of their autonomy and responsibility for individual decision-making. Everyone is very aware of his or her role in providing a community focused service. Following Appraisals managers send their staff a letter to summarise what the individual agreed to do and what they as a manager agree to do to support them.

Examples of empowerment within roles includes:

- One member of staff recently designed and delivered a presentation on Social Enterprise to encourage staff to consider the best use of their time and what they can do to sustain the company.
- One member of staff explained how she controls all budgets internally.
- One member of staff explained how she had designed recording documents around OCN requirements.

“As long as the requirements are met, I can do things in my own way”
“You are really made to feel part of the organisation it is so very personal”

8. People learn and develop effectively.

Managers recognise that they need a team prepared to respond to changes in funding and from the demands of Stakeholders. Managers make sure people’s learning needs are met through carefully planned training, suited to individual needs. These needs are formally discussed and action planned at Appraisal and Supervision. Development is identified to help the individual to gain the necessary skills and knowledge to meet their objectives. Learning is seen as very important to the success of the organisation and managers encourage individuals to grow through being involved in meaningful work. There are many opportunities available, such as:

- Attending in house and external courses.
- Sharing knowledge at team meetings.
- Attending conferences.
- Observing others.
- Internet research.

Following any development activities, managers are encouraged to talk to their staff to check whether training needs have been met and to ensure individuals are exposed to suitable opportunities for practice.

People (including managers) enthusiastically explained how their learning and development needs have been met. They described a range of learning and development activities including:

- PTLLS.
- Database training.
- Payroll.
- SAGE.

- Health and Safety.
- NVQ in Business Administration.

“We are learning all the time”

People described how managers inspire and motivate them to achieve their full potential by fully supporting them to pursue qualifications and take a continued interest in the all the organisation's activities. They encourage teams to work together and share their knowledge. Managers help people to acknowledge their expertise and encourage them to develop others through support and coaching on the job. People receive regular Supervisions where their aspirations are discussed and training and development identified to add to their skills and knowledge.

People confirmed that they are motivated to learn and enjoy putting the learning into practice. They believe that managers are extremely encouraging of staff to learn and to develop their potential. One Manager explained that as a result of achieving his NEBOSH Level 5, he will now be able to train others in house.

People who were new to the organisation described an effective induction process that fully prepared them to work for NSA.

People taking on new responsibilities, including those related to management are fully supported, developed and reviewed regularly through the Supervision and Appraisal process. They will discuss and set new targets appropriate to their role with their line manager. If secondments are taken a letter is issued to the member of staff prior to starting the placement. This letter lays down the requirements of the job, prior to the individual receiving an induction to their new role.

There is also now a policy for volunteer and a structured induction process. A task group manages the activities of the volunteers.

REVIEW: Evaluating the impact on the performance of the organisation.

9. Investment in people improves the performance of the organisation.

Senior Managers understood and could describe the organisation's overall investment of time, money and resources in learning and development. Monthly meetings provide an opportunity for managers to consider how learning and development has impacted on Critical Success Factors. A summative report is produced for the Board.

“The Board have seen huge achievements from staff. They are coming back from training better qualified, more motivated and are making more money for us”

Benefits of learning and development are evaluated at individual, team / project and organisational level. This involves the completion of evaluation forms, post-course discussions, identification of improved working practices and discussions during Appraisals and Supervisions. Objectives for learning and development interventions are identified at the training request stage. A form has been designed to facilitate this titled 'NSA Approval and measurement of learning activity'. Staff with the support of their line managers considers the impact a course or intervention may have, mapped to the Critical Success Factors and specific objectives. This provides the HR function with information to approve the course and for the individual to begin evaluating the learning after the event. The post learning evaluation paperwork has very recently been updated.

Managers described how the evaluation of their investment is used to develop the following year's Training Strategy and Business Plan. External measures are used extensively to measure performance and success.

As managers widely share information on organisational achievement, development and success, people were able to give examples of how learning and development has improved their performance, the performance of the team and NSA as a whole.

The organisation has really considered its approach to how it leads and manages people. Managers regularly review their approach and consider how people are being developed to manage in line with the culture and vision of the organisation. Views are sought from Staff, Beneficiaries, members of the Board and Partnership and all other Stakeholders.

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

Senior Managers gave examples of how the evaluation of their investment in people has resulted in improvements in the organisation's strategy for managing and developing people. Managers and people gave many examples of improvements that have been made. These include:

- Staff are now fully involved in setting objectives and developing team Workplans. Everyone is now part of a well-informed decision-making process. Managers make sure that all staff are involved in reviewing some part of NSA's planning and provide feedback. All staff are becoming familiar with the importance of reporting against the Critical Success Factors. As a result of focusing on the

Critical Success Factors, meetings are now becoming more outcome based as all attendees come with their own targets and priorities and report on these.

- There is now much more collaborative working which is achieved by:
 - Regularly visiting other projects.
 - Task group working.
 - Stakeholder days.
 - Administration staff moving around the projects.
 - Effective reporting at management meetings.
 - Managers sometimes attend each other's team meetings.
- Managers felt that monthly Supervision for all staff was too much to arrange and administer and a quarterly cycle would be more manageable and effective in line with reporting schedule of Project Workplans. This change is still awaiting Board approval
- The Appraisal process has been reviewed and developed by a task group.
- The corporate profile of management documents has been strengthened with an increased use of consistent colour coding.
- Introduction of the 'NSA Approval and measurement of Learning Activity' document directly linked to business objectives and Critical Success Factors.
- Monitoring and management of projects and outcomes has improved and all feedback documentation is completed and submitted to HR electronically.

Final comments included:

"Staff are now all focused on NSA as a whole. There is now much more joint working, visiting other sites and projects. It used to be a tribal thing now we are a much more closely knit unit"

"We all now know what is expected"

"The business plan has been one of the biggest changes – it is now something we can all focus on and it can link things together"

"Now people are thinking about the organisation and not just their jobs"

"We needed to get everyone focused and now we have really turned things around. Everyone now works with the same aim and have the same values"

"It is brilliant here – we put smiles on other people's faces"

"I have such a bond with the organisation and what it stands for"

4) Summary of Strengths and Areas of Good Practice

The key strengths / points of good practice highlighted by the Review were:

The organisation's strategies effectively cover the whole of the development cycle as specified by the Investors in People Principles. The organisation is very caring in its approach to people management and has tried to maintain the 'one team' ethos, despite growing and diversifying in the services offered. Managers in the company recognise that change is central to their planning process and consider the skills required to make necessary transitions in response to both internal and external factors.

The Managers have carried out work to ensure greater consistency in strategy development across the projects, integrally linked to NSA's Critical Success Factors.

There is a great sense of coming together to ensure the Beneficiaries and Stakeholders are happy. In addition to teams working well within Projects, there was a wealth of evidence of excellent joint Project working. There is a genuine desire by people to work together to make NSA a continued success. People really do understand the important contribution they make, due to a well defined and promoted vision for the future. The views of all Stakeholders are a key driver for organisational development.

The Appraisal and Supervision process is now widely accepted and recognised by employees as central to their development and linked to Critical Success Factors. People are realising their own accountability and enjoying the responsibility that is afforded to them. Staff are empowered within their roles and are given a high degree of freedom and flexibility to work in a way which suits them and the beneficiaries. Staff all understand the need for timely and robust reporting through the various procedures such as weekly reporting, SMARTER Workplans etc, and this helps them to see the vital part they play in NSA's success. The high level of ownership and empowerment given to staff is perceived by people as reward and recognition for the skills they have and the contribution they make.

NSA is becoming a learning organisation with individual and team development at the heart of its strategy. The training infrastructure is very strong and the organisation is very innovative in its approach to developing people, promoting a wide variety of developmental interventions to take account of differing learning styles and preferences. Teams share their learning and enjoy putting new skills and knowledge into practice. Development opportunities fully encompass all staff. Through effective management teams have now embraced the concept of sharing best practice within and across projects and teams.

Managers really value the ideas and inspiration that staff have to offer. They recognise the wealth of experience and qualifications their people have. They continually look at ways to involve the staff and to tap into the potential of every individual. A recent skills audit will also develop the way in which people's experience, qualifications and talents are recognised and used within NSA. Senior Managers have a clear vision of how they want to use this skills audit and ongoing identification of skills, to bring on talent within NSA.

Managers at all levels are inspiring role models for staff. All are involved in continuous professional development and understand the key part they play in driving the organisation forward. The SMT and BMT work very well together and they freely share

their knowledge and experience. There is, in turn, great respect for the personal strengths of individuals.

The approach to leadership and management within the organisation is underpinned by a genuine ethos of respect and value for one another. Staff seem very loyal to their managers and vice versa. People are very committed to doing the best they can and know they are fully supported to exercise creativity and individuality in their approach.

There is an suite of meetings to ensure effective communication throughout the organisation.

There is now a formal process of Induction for Volunteers.

Development of the planning and evaluation of learning and development, which now has direct links to the Business Plan.

The commitment and input of Trustees is particularly strong, they like to get to know staff and are fully informed of, and involved in, the activities of the organisation.

People love working here – they are proud of both their individual achievements and NSA as a whole. They fully appreciate the impact they are having on the community and they are dedicated to working in such a socially responsible way.

5) Summary of Continuous Improvement

The following suggestions for continuous improvement have been linked to NSA's Critical Success Factors:

5.1 Financial: Financial sustainability based on social Enterprise.

5.2 Community: Engagement with all aspects of the community through mutual support.

5.3 Process / delivery: Provide environmentally sustainable facilities and services that meet community needs.

5.4 People / learning: Develop internal and external stakeholders and systems to take NSA's mission forward.

Core Values

(Links to all Critical Success factors)

NSA needs must continue to demonstrate that it lives its values on a daily basis. Managers need to continue to translate the values into something individuals can put into practice in their working lives. This may be achieved through:

- Finding powerful ways of communicating with staff and helping them to connect to the values.
- Strengthen the link between individuals' values and aspirations and those of the organisation. Companies that use values most effectively and enjoy most benefit, spend time helping employees to identify common ground between their own values and those of the organisation.
- Use mutual interest to engage the talents and commitment of the staff.
- Use values as a cultural glue to 'connect' employees and support a social community based on shared goals.

Staff at NSA do believe that core values are at the heart of what the organisation does. More ongoing dialogue is needed to help people understand how the Core Values influence the work they do and managers need to understand how the values influence the way they lead and manage their staff.

As one of NSA's Core Values is Leadership, managers need to pay attention to the fact that not all staff will understand how this is applicable to their role. Managers may need to help some people to understand how they can develop and demonstrate leadership within their roles.

Managers have a major role to play if Values continue to be shared. It is the responsibility of leaders to communicate the vision, reinforce and show support for the new culture in everything they do. Through their own behaviours and values, managers can portray change positively, provide information and shape understanding.

Leadership and Management strategy

(Links to all 4 Critical Success Factors, but specifically 5.1.3, 5.2.1, 5.2.3, 5.3.1, 5.4.1)

The Assessor suggests that NSA's Leadership and Management Strategy needs to be developed in line with business and development planning, linking it to the Critical Success Factors.

Although the competences have been identified for NSA's managers to lead, manage and develop staff effectively, the framework should form an integral part of managers' Appraisals and resulting Action Plans. At the moment the framework contains very generic capability headings which could be applicable to the management of any organisation and which are open to a lot of interpretation.

The Assessor suggests that NSA may benefit from a more clearly defined and promoted set of competences, integrally linked to the Core Values and Critical Success Factors. This should form the basis of their leadership management and staff development strategy.

The following may be considered when drawing up requirements:

- How the Core Values of NSA influence people's management approach with a particular emphasis on how they help their team members develop their leadership qualities (one of the Core Values).
- How social responsibilities of NSA influence the way Managers work.
- How people make continuous improvements to the way they manage people.
- How Managers support people's learning and make sure needs are met at team/Project level.
- How managers can be 'inspirational leaders' to people at levels in the organisation to help them improve the way they lead, manage and develop their team.
- How Managers encourage knowledge sharing across the organisation.
- How Managers are involved in measuring and evaluating NSAs people strategies and how they involve their team in identifying improvements to the way they are managed and developed.
- How managers act on feedback.

The organisation now has matured and effective strategies for business planning and staff development are now fully embedded and understood. The leadership and management strategy of NSA, in terms of its written requirements, is however very generic and not centrally placed to guide how managers operate and continually learn and develop. The sophistication of business and learning and development planning (Indicators 1 & 2) linked to Core Values and Critical Success Factors is not yet evident in the Leadership and Management Strategy. Managers at interview had numerous examples of how they managed in line with the Core Values and how they set and monitor SMART objectives, yet when asked about the Management Competences / Requirements they really struggled to talk about how these related to what they did or how they influenced their development.

When reviewing the leadership and management strategy it would be interesting to ask the following questions (the approach taken by Senior Managers when developing their business strategy):

Where are we going?

Where have we been?
What resources have we got?
What is in place?
What are the influencing factors?
What do we want to achieve?

The recent management skills analysis will form part of the development of a robust and developmental leadership and management approach, which reflects the needs of NSA.

The organisation is very aware of the need for leaders and managers to be effective in order for the organisation to continue on its mission. Objectives are used to ensure performance remains focused and managers need to fully understand how cross-project working is essential to their achievement. It is important that the managers are regularly reviewed against the defined competences and that they receive constructive feedback on their performance.

Corporate Social Responsibility

(Links to 5.1.3, 5.2.1, 5.2.2, 5.2.3, 5.2.4, 5.3.1, 5.3.2, 5.4.2)

CSR involves the management of an organisation's impact on its stakeholders, the environment and the community in which it operates. These considerations have an impact on the decisions that an organisation makes as it performs its day-to-day functions. Managers need to have a range of skills and competencies at their disposal to help them manage effectively in this increasingly complex environment. The following may help Senior managers to incorporate CSR into their planning and monitoring processes:

- Emphasise to staff within teams/projects, the necessary qualities, attitudes and mindset needed to drive excellence in performance performance.
- To consider the learning and development needs of management and staff across organisation in terms of CSR.
- To consider how to develop the capacity for innovation and creativity, thereby creating more opportunity for generating income streams.
- To ensure managers are aware of what the impact CSR can have on organisational decision-making.
- For all managers to be aware of the key CSR issues relevant to NSA, and to have the skills to apply this knowledge to their Projects. Managers also need to be able to help other people across the organisation to integrate CSR into the decision-making process.

Training evaluation

(Links to 5.4)

It is important that managers in all parts of the organisation encourage staff to complete evaluation forms and training request forms in a meaningful way and to support people in applying their new skills and abilities. Managers need to identify if any further training

/ practice is required and to measure the impact on their performance and team performance.

Reward and Recognition

(Links to 5.4)

It is suggested that as part of an evolving reward and recognition strategy the Senior Managers consult with staff on what makes them feel rewarded and recognised.

Sharing best practice and developing strategy

(Links to 5.4)

With the planned formation of a consortium with other social enterprises, NSA can use this as an opportunity to share best practice and benchmark strategies particularly around the following:

- Reward and recognition strategies.
- Leadership and management strategy and best practice.
- Evaluation and return on investment.
- Strategies for managing equality and diversity.
- Worklife balance strategies.

6) Conclusion

Having carried out the review process in line with the quality assurance guidelines monitored by Investors in People Wales, I confirm that NSA is continuing to meet the requirements of the Investors in People Standard.

Recognition as an Investors in People is, therefore, maintained as from March 30th 2011

Name: Amanda McNamara

Investors in People Assessor
On behalf of Investors in People Wales

Date: 30th March 2011

Name of HRD Advisor: Howard Jones

Date of next Review: on or before 30th March 2014

APPENDIX 1: Overview of Evidence Requirements Met

Evidence Requirements met: All Core requirements plus 6 additional ones from the wider Framework.

ER	Indicator									
	1	2	3	4	5	6	7	8	9	10
1	Green	Green	Green	Yellow	Yellow	Green	Green	Green	Green	Green
2	Green	Green	Green	Yellow	Green	Green	Green	Green	Yellow	Yellow
3	Green	Green	Green	Yellow	Yellow	Green	Green	Green	Yellow	Green
4	Green	Green	Green	White	Green	White	Blue	Blue	Green	White
5	Green	White	Green	White	White	White	Blue	Blue	Yellow	White
6	White	Blue	White	White	Blue	White	Blue	Blue	Green	White
7	White	White	White	White	Blue	White	Blue	Blue	White	White
8	Blue	Blue	White	White	White	White	Blue	Blue	White	White
9	White	Blue	Blue	White	White	White	Blue	Blue	White	White
10	Blue	White	Blue	White	Blue	White	Blue	Blue	White	Blue
11	Green	Blue	White	White	White	White	Blue	Blue	White	White
12	Green	White	White	White	White	White	Blue	Blue	White	White
13	Blue	Blue	White	White	White	White	Blue	Blue	White	Purple
14	Blue	White	White	White	Blue	White	Blue	Blue	White	White
15	White	White	White	White	White	White	Blue	Blue	White	Blue
16	Yellow	Blue	White	White	White	White	Blue	Blue	White	White
17	Green	Blue	Blue	White	Blue	White	Blue	Blue	White	White
18	Blue	White	White	White	White	White	Blue	Blue	White	White
19	Blue	White	White	White	White	White	Blue	Blue	White	White
20	Blue	White	White	White	Blue	White	White	White	White	White
21	White	White	White	White	Blue	White	White	White	White	White
22	White	White	White	White	Blue	White	White	White	White	White
23	Green	White	White	White	White	White	White	White	White	White
24	Green	White	Blue	White	Blue	White	White	White	White	White
25	Blue	White	Blue	White	White	White	White	White	White	White
26	White	White	Blue	White	White	White	White	White	White	White
27	White	White	White	White	White	White	White	White	White	White
28	White	White	White	White	White	White	White	White	White	White
29	White	White	White	White	White	White	White	White	White	White

KEY

Green	Evidence Requirement Met	White	Yellow	Met with Development Opportunity
Red	Further Evidence Required	White	Blue	Indicator not assessed but some evidence seen

