

Commercial in Confidence



Investors in People
Post Recognition Review Report

For

Iain Rennie Hospice at Home

On behalf of



Assessor: Kate Harris

Review Date: 4th, 5th & 7th March 2008

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Appendix I – Assessment Outcomes Matrix

Appendix II – Assessment Plan

1. Introduction

Iain Rennie Hospice at Home was assessed and recognised as an Investor in People on 9th March 2005. This is the organisation's first post recognition review.

Its Vision is *'to have in place the best possible service to meet present and future needs as we strive to continue to deliver excellent patient care'*.

Its Mission Statement is as follows:

'We are committed to the provision of specialist palliative nursing care in partnership with the Primary Health Care Teams, to give people the choice to be cared for at home'.

Its Commitment statement includes:

'We will continue to provide a 24hr 7days a week on call service to patients within our catchment area'.

'We intend to continue to deliver a combination of specialist nursing skills and supportive palliative care and we are committed to supporting the patient and those people around them in the pre and post bereavement period'.

2. Changes and Progress Since Investors in People Recognition

- Although there have not been any changes in structure, there have been some expansion in some teams, including family support and fundraising.
- The Chief Executive retires from her post at the end of March 2008.
- Additional funds are now generated through Ebay selling, around which a new post was created.
- The IPR has been revised, and guidelines for managers have now been introduced.
- A new Chair of Trustees took up the post in July 2007.
- There is now collaboration with a day hospice, Grove House in St Albans, and the Director of Nursing is a shared post with IRHH.
- Exit interviews are now monitored to pick up themes.
- Vision Days were introduced to get the input of staff and volunteers.
- IRHH now use the NHS knowledge and skills framework of competencies for clinical staff.
- KPIs have been introduced in the past 6 to 9 months.

3. Review Objectives

Review objectives:

- To establish whether the organisation meets the requirements of the New Standard.
- To provide objective third-party feedback to aid continuous improvement.

4. Assessment Plan: See Appendix II.

Additional supporting evidence collected or examined included:

- Draft Strategic Review 2007
- 3 Year Financial Forecasts and Business Plan

Iain Rennie Hospice at Home

- Key Performance Indicators
- Managing Volunteers (1 day workshop) Objectives.
- Wage Page (February 2008)
- Training Record – 2007
- Continuing Education Programme 2008: for IRHH Specialist Support Nurses and Community Nurses.
- Shops and Trading Strategy 2006 – 2011.
- Managers – Role Profiles
- IRHH Appraisal (IPR) Guidelines for Managers.
- Staff IPR and Development Plan.
- Induction documentation
- IRHH Training and Development Policy
- IRHH Equal Opportunities and Diversity Policy
- Volunteer Review Preparation
- IRHH Annual Review 2006/07
- New Nurse Pack
- Specialist Nurse Competency Framework (Sample Competencies)
- Volunteer Induction Pack

5. Executive Summary

The key findings of the review indicated that Iain Rennie Hospice at Home meets the evidence requirements of the National Investors in People Standard.

The summary below represents the review findings within the context of strengths and areas of good practice and suggested areas of improvement.

5.1. Strengths and Areas of Good Practice

- The purpose and vision of the organisation is extremely strong and shared by everyone within it.
- The shared values and ethos have created a strong bond in building a 'whole' organisation team.
- The strategic analysis, review and decision is extremely good as demonstrated in the strategic and business planning documents.
- Everyone in the organisation is very clear as to their objectives and how to achieve them.
- Good at identifying valuable development at the strategic level.
- Culture very much encourages staff input and ideas, and to run with them.
- Very much a learning culture, the organisation acknowledges different needs and accommodates these.
- Excellent management and leadership at all levels: providing good role models, open door policy, caring, supportive, listen, coach, mentor and lead.
- Lots of good constructive feedback to staff.
- Very high sense of value in all staff.
- Very open and consultative communication.
- Encourage ownership at all levels.
- Induction processes are excellent.

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- Support given to staff development and achievement of relevant professional qualifications is good.
- Good level of awareness of the investment you are making and how some of that is impacting.
- Strong commitment to continuous improvement of how you manage and develop people.

5.2 Suggested Areas for Improvement

- Consider developing your business planning to include an Improvement Strategy and Plan, highlighting your priorities for improvement across the key areas of the organisation, including improvements in knowledge and skill to support achievement of your objectives and priorities.
- Consider also developing an action plan format, so that you can clarify the goals, actions, responsibilities, timescales, success criteria and/or KPIs.
- Consider developing planning format so that the organisation plan can cascade into dept/team plans, using a similar/same format.
- To encourage staff prior to development to identify how it will improve their performance and impact on the organisation. Could consider using a pre/post training form to aid evaluation.
- To consider using management competencies to aid develop in this role.
- Consider develop a competency framework across all areas of the organisation.
- Consider how you can measure the impact of staff development on the KPIs.
- Consider developing a quarterly or half yearly evaluation summary to consider how staff development has impacted on KPIs.

6. General Findings Relating to the Principles of the Investors in People Standard

Principle One – Developing Strategies to Improve the Performance of the Organisation

COMMENTS IN RELATION TO

- The strategies for improving performance
- Strategies for learning and development
- Strategies for managing people
- Strategies for leadership and management

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

Senior management has ensured that the vision and purpose of the organisation is clear to everyone, and is reviewed on an annual basis. They hold a 'Vision' day every year to provide the opportunity to re-look at their vision and for staff and volunteers to contribute to this process.

Senior management were able to provide evidence of the current business plan and business plan in development, and to talk through the process they undertake in putting their plans together. The Chief Executive explained how KPIs have also now been put into place in the past 6 to 9 months.

Managers described how staff have input into planning via the regular team meetings, and strategies are also set for the key areas of the organisation. The Shops and Trading Strategy 2006 -2011 was evidenced and shows the key priorities and actions for this area.

Managers were able to explain their key objectives and targets. The shop managers explained how they have annual/monthly targets for takings:

- *'Keep you focused, ensure you don't plod along'.*
- *'Challenge to meet the targets, we're quite competitive'.*

The managers on the nursing side of the organisation were also able to talk through their key aims and objectives, some of which include developing the collaborative relationship with other services, including the NHS, within their boundaries.

Managers, staff discuss and agree their individual objectives and targets as part of their Individual Performance Review (IPR), which takes place on an annual basis, with a 6 month interim review.

Indicator 2: Learning and development is planned to achieve the organisation's objectives.

As part of the organisation's ongoing strategic review and business planning processes, the priorities for learning and development are discussed and identified.

Reference to key organisational learning and development needs are made within the organisation's strategic review and business plan.

Managers were able to explain how staff development needs are planned and met. The Professional Development Lead for the nursing staff, acts as the key person in planning the programme of development for the clinical staff. It was explained that IRHH is now using NHS framework of competencies to assess the acquisition of the required knowledge and skills.

Staff confirmed that the key process for the identification and planning of individual development is within the IPR process, on a twice yearly basis.

A process for volunteer review is also available on an annual basis, but is a matter of choice for the volunteer. Some do value this opportunity but many also do not feel this is something they need at their particular stage of life, and are happy that ongoing informal support and feedback is always available.

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

Senior management described how they have sought to create an environment within IRHH that encourages people to put forward improvement ideas. The annual Vision day involves the range of people within the organisation and encourages their contribution of ideas in helping IRHH to continually develop and improve.

Managers at all levels described how seeking the input of ideas and suggestions is now very much part of the culture of IRHH, and part of their role in involving and motivating staff and volunteers.

A shop manager described how they always encourage volunteers to contribute their ideas.

'An idea to change the shop layout to attract more customers was implemented and was successful.'

The organisation has a formal Equal Opportunities and Diversity Policy in place, which is reviewed and updated alongside other policies.

Interviews at all levels and across all categories of staff and volunteers confirmed that IRHH strives to provide everyone with equality of opportunity to develop. Many of the volunteers commented on how they are made to feel as equal a part of the organisation as every other member.

IRHH now has a formal Training and Development Policy. Staff and volunteers all commented on the very effective support and development that is made available to them all.

Staff and volunteers confirmed that the organisation *'actively encourages ideas and if it is good they will go with it.'*

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

Senior management explained that they encourage all of their managers and team leaders to work towards professionally recognised qualifications that will enhance their leadership and management skills and gave examples to illustrate:

- Chief Executive – D.M.S.
- HR Lead – CIPD
- Nursing Director – Masters in Hospice Leadership

All of the shop managers are encouraged to attend courses run by 'Help the Hospices', such as 'Managing Volunteers'.

Management described the capabilities needed as including:

- *'People focused, patient, communication skills, assertiveness, leadership skills'.*
- *'People management skills, organisational skills, financial skills'.*

People described the capabilities needed in effective managers as including:

- *'Good at communication, keep you informed; feedback from meetings'.*
- *'Motivate you; make you want to work to your full potential'.*
- *'Open door policy; approachable; listen'.*

Principle Two – Taking Action to Improve the Performance of the Organisation

COMMENTS IN RELATION TO

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

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

Interviews at all levels demonstrated that there is very effective leadership and management within IRHH.

Managers explained how they are effective in leading and managing people:

- *'I have 6 weekly meetings with the managers to review progress on figures and budgets'.*
- *'Give staff on the job coaching; ensure that they get support to develop the necessary skills'.*
- *'By encouraging staff to develop their own interests and ideas; and to give them as much ownership as possible within their role'.*

Managers were able to describe how they give constructive feedback to people:

- *'I carry out regular observations of the clinical staff and give feedback'.*
- *'The IPR process provides the opportunity to give staff feedback on how they are'.*

performing'.

- *'In the IPR I acknowledge with staff what they are achieving'*.

People described how they receive regular constructive feedback:

- Nurse: *'I had my IPR in January; it was very useful, pinpointed goals to achieve, I have another review in April'*.
- *'I get a lot of one to one management support and coaching'*.
- *'I have regular supervisions which are extremely useful'*.

People were able to describe how managers have been effective :

- *'I get a lot of support and feedback from my manager'*.
- *'Brilliant support from Team Leader'*.
- *'Manager is very hands-on, and has an open door policy'*.

Indicator 6: People's contribution to the organisation is recognised and valued.

Managers were able to describe how they recognise and value staff and volunteer contribution:

- *'Through the feedback I give, including within the IPR'*.
- *'Email staff to say well done'*.
- *'Encourage volunteer's particular interests; give them ownership and responsibilities'*.
- *'Say thank you; buy flowers, supply coffees and teas.'*
- *'Say thank you every time they leave the shop, praise them, buy cakes'*.
- *'We organise an outing for the volunteers each year to say thank you'*.

People were able to describe how they contribute positively:

- *'Help the shop achieve and do better than its target'*.
- *'Through our ongoing care help patients to stay in their own homes'*.

People were able to describe how they feel highly valued :

- *'Hugely, lots of praise and affirmation, always support available if needed'*.
- *'Very supported, very invested in'*.
- *'Best place I have worked for, very valued'*.
- Volunteer: *'Constantly thanked, want to keep you happy'*.
- " *'Chief Executive is down to earth, approachable, makes you feel valued'*.
- " *'Grateful for what you do, get praised'*.
- " *'Never fail to say thank you'*.
- " *'Never made to feel you've got to do it'*.
- " *'Volunteers are equally valued'*.

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

Management explained how people are involved in decision making, and a key part of that process is the 'Vision Day':

- *'Main occasion to bring everyone together, mix people up, look at fundamental issues, also look outside the box, and team build across the organisation. Ask them*

questions e.g. if you were the Chief Executive for 6 months, what would you do?

A range of regular meetings take place at all levels and across the organisation throughout the year, to ensure that everyone is involved and has the opportunity to input into decision making.

These include meetings for trustees, senior management, managers, shop managers, nursing staff, and volunteers.

Interviews showed that people are given full opportunity to contribute to decision making, where appropriate, and take ownership for the work that they have developed or are delivering.

- *'On the vision day, everyone comes together. We brainstorm ideas. It's a real feel-good day'.*
- *'Open, changing, growing organisation that listens to the people within it'.*

Indicator 8: People learn and develop effectively.

There was evidence of a very significant amount of effective learning and development amongst the nursing staff. The team leaders described how they play a key role in monitoring and developing the practice of the nursing staff.

The Professional Development Lead person clearly performs a very effective job in ensuring that there are a range of ongoing development activities for the nursing staff:

- Monthly education slots.
- Weekly nurses' meetings which always have a development element to them, *'constant learning experience, share our experiences'.*
- *'Staff development is disseminated at weekly meetings'.*
- *'Professional Development Lead organises a rolling programme of internal training, which is very good'.*
- *'Professional development is planned for the whole year for all teams'.*

Managers and team leaders have been encouraged and supported to gain relevant management qualifications within their specialist area:

- A Team Leader gained a lot of confidence through completing an Advanced Diploma in Management & Leadership in Health & Social Care.
- The Voluntary Services Manager & HR Lead has been supported to gain the CIPD qualification.

Shop managers have the opportunity to attend a workshop entitled 'Managing Volunteers', which they find extremely useful in guiding their approach.

Staff in fundraising are encouraged and supported to gain recognised fundraising qualifications, and join the Institute of Fundraising, and attend relevant fundraising conferences.

Most volunteers' training is 'on the job', but in some areas of the organisation more specialised training is organised:

- *'I had bereavement training, weekly sessions over 10 weeks. It was well thought out; gave me what I needed'.*

New joiners to IRHH confirmed a very effective induction into the organisation and their

role:

- Specialist Support Nurse: *'The induction programme was brilliant, and took place over a period of 6 weeks. It involved peer visits initially, weekly development sessions, attending meetings across the whole group'*.
- *'Jigsaw was excellent'*.
- *'Our professional development is up to date'*.
- *'Well supported induction training'*.
- *'I currently have fortnightly supervisions, where I get feedback on my progress'*.

Everyone commented on how valuable it was to spend time in different areas of the organisation to get to know and appreciate everyone's contribution to IRHH.

Principle Three – Evaluating the Impact on the Performance of the Organisation

COMMENTS IN RELATION TO

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

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

Senior management described the resources invested in staff development as including both a central budget, but also budgets that are delegated out to managers and team leaders to enable to make decisions on supporting development needs at that level.

The organisation has a manager responsible for HR, and has a dedicated trainer who oversees the ongoing CPD of the nursing staff. The organisation has recently taken the decision to invest in an additional trainer to support the development of nursing staff.

The business management meeting which is held on alternate months proves useful to people. Chief Executive leads and representatives from each area of the organisation attend. *'This is very good, provides a very useful overview; brings everyone together'*.

An ongoing audit programme is takes place to maintain and develop standards on the clinical side.

Management described the impact of development on IRHH:

- The development of an Ebay Co-ordinator has enabled IRHH to earn significant additional income from collectables. Over the past year this has increased from £20,000 to £35,000.
- Development of the fundraising team has helped them double their target from £150,000 to £300,000.
- Shop managers are exceeding their targets.

Managers and staff were able to explain how development had impacted on their performance.

The HR Lead explained how gaining the CIPD qualification enabled her to develop her

skills, which enabled her to:

- Review and revise the IPR process and documentation.
- Produce guidelines for managers.
- Create a written Training & Development Policy.

A Fundraiser described how her qualification in Fundraising Management had enabled her to:

- Develop fundraising strategies.
- Produce Gant charts.
- Run a successful raffle.

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

Managers were able to describe how they have brought about improvements to the area of people management and development, and these include:

- The use of competencies within the knowledge and skills framework, *'make it far easier to measure what you have achieved'*.
- *'Competencies are helping to develop people within their specialist area. We monitor competencies throughout the year. Set development objectives to build up competence to a higher level'*.
- *'On the nursing side we are collaborating more to create a more seamless package with other similar organisations'*.
- *'The IPR has been reviewed and revised, and guidelines for managers help to ensure a consistent process'*.
- *'Exit interviews are now being monitored'*.
- Team Leaders are being developed to take on more of a management role.

Staff were able to illustrate improvements that have been made to the way they are managed and developed:

- *'Definitely noticed that team leaders have realised they've needed to raise their game, and have worked towards management qualifications'*.
- *'Communication has continued to get better and better, and is now very good'*.
- *'The Vision Day has been great in getting everyone together and putting in their ideas'*.

7. Conclusion

Having conducted the review in accordance with Investors in People UK and The Assessment Network's guidelines, Iain Rennie Hospice at Home was able to provide sufficient evidence to demonstrate that it meets the requirements of the Investors in People National Standard.

The organisation has clearly continued to develop and progress following Investors recognition.

It was a pleasure to visit an organisation which is clearly so well managed and run. The very strong sense of teamwork across every part of IRHH was quite exceptional. It was clear that everyone is very motivated by the very strong vision and purpose that you hold on to.

The exceptional leadership of the Chief Executive has been a key factor in the development of such a strong, successful and well respected organisation. She will clearly be missed by everyone. However the culture, teamwork and standards that she has developed and fostered are well embedded and should therefore continue and grow.

I wish the new Chief Executive all the very best as she steps into the shoes of someone who has clearly made a lasting impact on IRHH and its people.

I would like to extend my thanks to everyone that took part in the review for their open and honest feedback in respect of their experience with Iain Rennie Hospice at Home, and wish everyone success in the journey ahead.

8. Next Review

IAIN RENNIE HOSPICE AT HOME will be required to be reviewed no later than 7th March 2011, although it is entirely possible to be reviewed prior to that date. For guidance on future Investors in People review options, please contact The Assessment Network Ltd.

9. Quality Assurance

The Assessment Network Ltd is responsible for the Quality Assurance of this assessment and will invite a representative from IAIN RENNIE HOSPICE AT HOME to take part in a Quality Assurance Questionnaire. This questionnaire was devised and developed by Investors in People UK, with the objective of receiving client feedback in order to provide for a consistent approach to the assessment and recognition process. Further details will be forwarded by The Assessment Network Ltd in due course.

Kate Harris
Investors in People Assessor

REVIEW OUTCOMES MATRIX

STRATEGIES AND PLANS	Evidence Requirements Met (Y/N)	Evidence Requirements Not Met (List)
➤ The strategy for improving the performance of the organisation	Y	
➤ The strategy for learning and development	Y	
➤ Strategies for managing people	Y	
➤ Strategies for leadership and management	Y	
TAKING ACTION		
➤ The effectiveness of managers	Y	
➤ Recognising and valuing people's contribution	Y	
➤ Involvement and ownership	Y	
➤ The effectiveness of learning and development	Y	
CONTINUOUS IMPROVEMENT		
➤ Performance improvement as a result of investment in people	Y	
➤ Continually improving the way people are managed and developed	Y	

