INVESTORS IN
PEOPLE UK

Investors in People
Maintaining Recognition Report

For

Beales Hotels

On behalf of

The
Assessment Network

Assessor: Martin Turner

On Site Date: 28th February to 3rd March 2006 and 21st February 2007

Contents

1. Executive Summary

The key findings of this review assessment indicate that Beales Hotels have fully returned to meeting the National Investors in People Standard. The summary below represents the assessment findings within the context of identified strengths and some suggestions for further development.

Beales Hotels has a significant level of formal and informal management activity to provide a platform to support the effective management and development of people. There is a high level of business planning that incorporates strategic needs of the business and plans for the development of staff. The next short, medium and long-term plan is now developed and involves staff and management in setting out broad objectives for the future.

Managers are involving people in the business plan process and discussing, engaging and motivating people to develop knowledge, skills and understanding related to their part in the overall business aims and objectives. In many examples, people confirm objectives relative to their team or role.

Appraisal is undertaken for all staff and some innovative documentation has been developed to help people where English is a second language. People confirmed formal and informal activities that support the planning of their respective learning and development. The management teams involve people almost on a daily basis in support of learning and development activity.

Individuals are encouraged to contribute to their own or others improving performance by shadowing, working with different teams or helping new starters by working in pairs. The organisation, as a whole, recognises the different needs of people and, in the case of learning English as a second language, have introduced learning and development activity to help support overseas learners in a variety of roles.

People feel there is a genuine commitment to ensure an equal opportunity to develop and that resources are made available to support learning and development. Managers are more engaged and the level of leadership and management skills has developed to reinforce the overall organisation's commitment to learning and development and is in line with people and business needs.

There are a number of examples where, through meetings, or informal discussions, people feel they have been encouraged to contribute ideas to improve performance, generally, all aimed at improving customer service and achieving high ratings with external bodies such as the AA. The engagement with teams to develop SOP manuals and involve people in developing creative and innovative ideas to improve performance has had a positive impact on the hotel's overall performance.

Managers are able to discuss what an effective manager should be doing to manage and develop people and the core competency for the manager's role is defined through a competency matrix identifying key requirements for the role. Revisions to appraisal help greater focus on reviewing managers in their role.

People feel their respective manager is effective, and people feel the accessibility and involvement of management is a positive approach to staff support, learning and development.

Performance is measured and assessed across both sites and, overall, people are involved and engaged in improving performance. Significant improvements in management of teams, systems and processes mean that performance is measured across a number of aims and objectives relative to this or that team. Close links from learning and development activity can be made to improving performance in terms of restaurant covers, bar sales, events and AA ratings.

Albeit small improvement through existing systems and processes might benefit a broader understanding of learning and development objectives and its links to performance measures, the organisation is able to establish if learning and development needs have been met (mainly through observations) and improving performance in terms of the aforementioned SOP manuals (Standard Operating Manuals) or revenue generation, costs savings or efficiencies in working practice.

There are a number of areas where people's individual or team involvement leads to decision making to improve performance and people feel encouraged to take ownership and responsibility to take action. The development of SOP manuals, regular staff meetings, development of management and teams helps people to be more willing and prepared to be part of decision making and take ownership and responsibility.

Induction to new or changed roles is now consistent and, where undertaken as the organisation specifies, people feel that their respective induction has been appropriate and effective and met all their needs.

Senior managers and managers are able to evaluate the investment in learning and development through appraisal, external feedback and performance against targets. The evaluation is more effective with improvements made in systems, processes, management and teams. This contributes to a focus for future planning activity and helps strategies in learning and development of all staff.

People are able to discuss improvements in performance and, generally, there are formal and informal activities to support the review of outcomes from learning and development actions. This aspect is much improved and reflects the management's progress in engaging and involving people in developing services, standards and overall business performance.

In recent times there have been a number of strategies implemented to improve the effectiveness of how people are managed and developed and, overall, is improving performance. People development planning is now more easily implemented and with the advent of a staff accessible web site people are more encouraged to be involved in aims and objectives for the business and their own learning and development activity.

Particularly noteworthy is improvements in effective management and support of learning and development in the alternative appraisal documents for overseas staff' the web site, the revised appraisal, the development of SOPS, the development of the manager's role, the use of the management competency matrix, engaging and involving people in developing the corporate promotional material and appraisal action planning.

Key Strengths
- A structured and detailed business plan that is cascaded from the top and takes account of people development with a set of specified business objectives.
- Measures of performance linked to people development to improve how learning and development objectives are set.

- A broad range of activities to support identifying individual and team learning and development needs. For example, observations, appraisal, meetings, job chats, AA action plans, NVQ assessment and informal reviews, questionnaires to test learning activity.
- A structure of resources to support all staff's learning and development needs. For example head office input, local level expertise and finance and facilities.
- A number of forums where people have the opportunity to make a contribution to improve performance such as monthly management meetings, ten at ten, staff AGM, day-to-day staff briefings, HOD meetings, team meetings.
- A culture and ethos of commitment to staff development in support of everyone and planning peoples' future learning and development, championed from the senior level.
- Managers with a good sense of what can be effective leadership and management, with specific focus and definition of requirements in the role.
- Opportunities to balance formal and informal management practices and ensure all staff are managed appropriately within their role and are able to improve performance from being engaged and involved with their own or team objectives.
- The use of such things as employee of the quarter/month, employee of the year or social events to recognise and value all staff.
- A platform such as appraisal or regular meetings to be able to develop greater involvement and ownership of business aims and objectives.
- Structures to allow senior and middle management evaluation of learning and development outcomes and assessment of performance and benefits, to be able to plan future development against learning and development objectives, set clearly and, reviewed with individuals and teams, to ensure learning and development actions have been met.
- Some useful motivational activities to help engage and involve people in ownership and responsibilities. For example, developing SOP manuals or different working practice.

Suggested Development Areas

- Through the improved appraisal activity consider further opportunities to link, more easily, performance measures in the action planning stages and set out 'action plan objectives' more succinctly. *For example: By the next review implement the new SOP manual and as a result increase event revenues from x% to y% year on year'*

- Where managers agree learning and development objectives in formal or informal activities, consider clearer statements of how the learning will be evaluated need to be expressed more often. Perhaps, occasionally, a more formal observation and feedback or, extending the questionnaires (quizzes) to more teams or, more learner demonstrations or presentations. This will help provide management with information on, how well did the learning and development activity work? Did the learner learn? What might be changed or improved?

- Additionally, when planning and agreeing learning and development objectives, consider including more specific performance measure. *For example: - 'by the end of this session you will be able to serve drinks from the bar and reduce customer complaints. You will be formally observed in one month's time to ensure you are reducing customer complaints from x to y'.' Or, 'by the end of the management development course, you will be able to demonstrate your presentation skills at a team meeting and be able to agree team objectives with your staff and as a result implement quality requirements.'*
  .

- There are a number of opportunities within the management competency matrix to extend the detail of what a Beales Hotel manager 'looks like' i.e. demonstrated knowledge, skills and behaviours. Consider competency standards such as MCI (METO), which might provide a more robust framework and so help with performance review or identifying key learning and development objectives and inform succession and recruitment.

- I have mentioned the strength of management in supporting the operations of the business and there are a number of good practices being undertaken by some managers to support the development of staff. Consider how to share good practices (so they can be replicated) through the management structures.

2. Introduction

Since the last report one site has been sold and activities have been implemented in line with the Investor in People action plan.

2.1 Changes and progress since last Investors in People review assessment

- Planning: Drafting the next organisation plan has commenced with the involvement of managers and staff.
- Communication: A staff accessible web site has been launched and managed teams are involved in discussing and developing SOP manuals. New corporate brochures have been produced. Human resource information is freely available on the web site.
- Induction: - Is now more robust through regular review and appraisal documentation.
- Performance Review: A revision of the appraisal activity has been implemented with more focus on people's performance in this or that role. Foreign language documentation has been introduced.
- Management effectiveness: Managers have access to a competency framework and teams have now more structured management.

3. Assessment and Client Objectives

- To undertake a maintaining recognition review assessment against the National Standard Investor in People.

4. Assessment Plan

(See Appendix One with changes highlighted in red)

It was agreed that I would undertake one-to-one interviews across one-site covering 20 staff, representing the majority of roles and functions in the group. I agreed that evidence gathered at the previous review was banked against this site-visit. At the time of the site visit a number of changes had to be made to accommodate shift patterns and availability of staff. This did not affect the evidence gathering process.

5. Findings against the Investors in People Standard

Principle 1. Developing strategies to improve the performance of the organisation

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

1.1 Top managers make sure the organisation has clear purpose and vision supported by a strategy for improving its performance The overriding vision and purpose of the business is set out in the organisations business plan and states specific aims for business performance and staff performance relating to standards of service, achieving or exceeding customer expectations. For example: 'to consistently exceed the expectations of our guests and our employees through a passionate and progressive approach to hospitality'   **Indicator Met**
1.2 Top managers make sure the organisation has a business plan with measurable performance objectives I found the senior level plan and vision for the business is cascaded through to individual Hotels. The plans incorporated measures of performance related to achieving industry ratings, improving service in restaurants, raising the levels of customer satisfaction, meeting mandatory requirements and developing staff accordingly. For example: • 'To ensure the overall Hotel sales target of £x is achieved' • 'To increase our percentage AA rating from x%.'   **Indicator Met**
1.3 Top managers make sure there are constructive relationships with representative groups (where they exist) and the groups are consulted when developing the organisation's business plan This particularly area does not apply.
1.4 Managers can describe how they involve people when developing the organisation's business plan and when agreeing team and individual objectives Managers described how they involve people in developing the business plan and agreeing team and individual objectives. For example, managers discussed appraisal, job chats, team meetings and work plans. Managers involve people in team and individual objectives regularly. For example: • 'There has been a staff AGM with presentations on vision and values. There are heads of department meetings where objectives are discussed. For example, ensuring standards of welcome are met. Standards are cascaded through heads of department to staff.'   **Indicator met**

1.5 People who are members of representative groups can confirm that top managers make sure there are constructive relationships with the groups and they are consulted when developing the organisation's business plan

This does not apply in this organisation. However, there are representative teams for such things as environmental issues and people are involved in agreeing and delivering to standards to improve the hotel's 'green' credentials.

For example:
- 'There is a green team on the environment to conserve energy and reduce costs and is part of our green plan.'

Indicator met

1.6 People can explain the objectives of their team and the organisation at a level that is appropriate to their role and can describe how they are expected to contribute to developing and achieving them

In all cases, people can explain something of the objectives of their team and how they are expected to contribute to achieve them. Albeit, some more succinct than others. Overall, people can describe how they develop and achieve objectives.

For example:
- 'To have good running of the kitchen and serve good food.'
- 'To achieve a four star rating and to ensure the buffet is refreshed regularly.'
- 'To provide effective, friendly service.'
- 'To take forward and implement core standards.'
- 'I have objectives to create a good environment and exceed expectations.'
- 'To implement the SOP so everyone works to the same standard.'

People discussed meetings, job chats, appraisal and reviewing departmental performance from guest feedback or monthly team meetings.

Indicator met

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

2.1 Top managers can explain the organisation's learning and development needs, the plans and resources in place to meet them, how they these link to achieving specific objectives and how the impact will be evaluated

Strategies to support the development of staff and performance included planned appraisal, job chats, internal and external learning and development plans, rotation through departments, shadowing and induction. In all instances, learning and development activities are planned to improve performance against the aforementioned objectives set out in the group business plan.

Evaluation at the senior level is undertaken against the performance of individual hotels and critical performance measures such as reducing costs, raising standards or meeting mandatory requirements. NVQ assessment or observations are examples of how evaluation is undertaken with outcomes (impact), being cascaded upwards, to inform future learning and development plans.

For example:
- 'Our training and development needs are for NVQ supervisory in a number of areas. We have huge support from H.O. and we are measuring the level of staff morale, profit, customer satisfaction, AA ratings, the menu specifications and training implications.' (Para)

Indicator met

2.2 Managers can explain team learning and development needs, the activities planned to meet them, how these link to achieving specific team objectives and how the impact will be evaluated

In all cases, managers discussed aspects of learning and development needs and most often cited 'customer service' as a performance measure. Some managers discussed aspects of improving 'covers' or 'up selling' to increase revenues or guest visits and how people's learning and development needs included Visual-One training or, serving customers or, learning about the SOP manuals.

For example:
- 'For learning and development needs there is a mandatory list and timetable, for example Visual-One with a plan to do it in one-to-ones.'
- Learning and development needs are reviewed at appraisal, for example to learn about x and make better recommendations. For Visual-One there is post course evaluation and longer term appraisal.'

Indicator met

2.3 People can describe how they are involved in identifying their learning and development needs and the activities planned to meet them

In many cases, people described forums where they are involved in identifying learning and development needs and how these needs would be met. People described appraisal, meetings, action plans and their learning and development needs relating to being able to provide good service, improve standards service or raising the level of bookings. In all cases, people can discuss how these learning and development needs are planned. For example, one-to-one coaching, courses, shadowing, internal training sessions and follow up by trainers.

For example:
- There is more management training and mandatory training to be able to manage different situations like discipline. There are courses.'
- 'I have a list of my training needs, for example x and y training. There are discussions in different departments to learn core standards.'

Indicator met

2.4 People can explain what their learning and development activities should achieve for them, their team and the organisation

People explained that their learning and development activities achieved specific outcomes related to improved knowledge in the role or being able to use equipment or improving the level of revenue or bookings for this or that department. In all cases peopled described outcomes from the learning and development plan as contributing to the overall performance of the hotels in terms of AA rating, guest comment and image of the hotels.

For example:
- 'I needed to learn how the x system works and understand the meet and greet and learn

through practical work and shadowing and change the way I greet people.'
- 'To learn on *x* and on *y*, different types and variations and be able to prepare for guests.'

Indicator met

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

3.1 Top managers can describe strategies they have in place to create an environment where everyone is encouraged to contribute ideas to improve their own and other people's performance

Senior managers discussed such things as appraisal, management meetings, manager tea parties, away days, job chats, the day-to–day opportunities but, most importantly, the ethos and culture of the organisation that cascades through all parts of the business.

Senior managers described the balance of formal and informal strategies and how performance had been improved with such things as sales, AA rating and guest comments. For example: -
- 'Heads of department are part of leading and encouraging others to improve their own or other people's performance. Team working is part of the culture.'

Indicator met

3.2 Top managers recognise the different needs of people and can describe strategies they have in place to make sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for people to learn and develop which will improve their performance.

There is a diverse workforce across sites and senior managers have developed formal and informal support for different staff with varying learning and development needs including full time to part time or where English is a second language.

Notice boards and meetings are used to cascade opportunities for learning and development and people have regular opportunities through job chats to access learning and development. The web site gives more access to human resource information.

Learning and development for all staff is linked either explicitly or implicitly to performance. For example, a number of people have taken the opportunity to improve their English and are accessing ESOL. This is to help communication in teams and with guests.

Developing the NVQ assessor within roles is aimed at ensuring AA ratings and overall team performance is delivered to high standards. A recent revision to appraisal documentation helps foreign language staff. There is paid time for learning and development activities involving part time or casual staff.

Indicator met

3.3 Managers recognise the different needs of people and can describe how they make sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for people to learn and develop which will improve their performance

In all cases managers do recognise the different needs of people and can discuss how they make sure everyone has appropriate and fair access. Managers acknowledge the different needs of people and recent developments in this area have improved the accessibility of learning, for example, developing SOP manuals, appraisal or the web site.

Typical of comments are:
- 'There are notice boards and on-line access, appraisals. We can help casuals make a transition to permanent staff and for part time or casuals there is paid time for training.'
                                                                        Indicator met

3.4 People believe managers are genuinely committed to making sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for them to learn and develop which will improve their performance

In many cases, people feel there is a genuine commitment to support everyone and that there is appropriate and fair access to learning and development opportunities to improve performance. A number of general comments were summed up with: -

- 'Without a shadow of a doubt there is a commitment for development and support. I give them 8 out of 10. Although they could provide more follow up and encourage people to take up opportunities more often.'
- 'They are good. I have had opportunities and have had managers drive me and they have opened up opportunities. It works well for individuals.'
- 'I feel there is a commitment from managers. There is always discussion on training.'
                                                                        Indicator met

3.5 People can give examples of how they have been encouraged to contribute ideas to improve their own and other people's performance

In many cases, people feel they have been encouraged to contribute ideas to improve their own and other people's performance, for example, sharing recipes to improve restaurant menus, developing manuals or the corporate brochures. In all instances, people highlighted how this or that idea improved team and hotel performance. Typically against revenue, bookings or AA ratings.

Typical comments included:
- 'We have x meetings and learn the operational requirements and improve y reconciliation.'
- 'We are encouraged at meetings for briefings and asked to make a contribution, for example the things to go into the y to make it go well. I got the chance to show what I could do and advice and feedback to others' (Para)
                                                                        Indicator met

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

4.1 Top managers can describe the knowledge, skills and behaviours managers need to lead, manage and develop people effectively, and the plans they have in place to make sure managers have these capabilities.

Senior managers discussed the management appraisal and their expectations of managers within the business. A key element of appraisal is assessment as 'effective manager' and 'effective leader'.

Although not formalised with specific criteria, managers are required to demonstrate these

capabilities. For example, managers are developed within their role through departmental rotation to give them knowledge of all aspects of the hotel, management courses to develop management competences and behaviours and or, regular meetings with senior managers.

Indicator met

4.2 Managers can describe the knowledge, skills and behaviours they need to lead, manage and develop people effectively

Managers can describe what they see as the knowledge, skills and behaviours in terms of 'knowing about the department, being able to manage staff and being able to communicate.'

Managers could describe what they needed to be effective in their role with typical comments such as:
- Relating to teams.
- Including teams in decision making
- Valuing people's contribution
- Listening.
- Engaging more in problem solving and ideas generation.
- Leading from the front and providing resources.
- Have practical application of process and systems

Indicator met

4.3 People can describe what their manager should be doing to lead, manage and develop them effectively

People described mangers as being able to be accessible, listen to them, set examples and keep them informed. In many cases people explained that managers needed to help support their training and identify learning and development needs.

Typical comments included:
- 'Be able to communicate with all departments.'
- 'Lead meetings and work one-to-one with individuals and they need problem solving skills.'
- 'They should listen'

Indicator met

Principle 1 - Suggestions for Improvement

- Use performance measures more often in learning and development objectives and appraisal. I.e. quantity, quality, cost and or time.
- More often use the technique of stating how this or that learning and development impact will be evaluated and met. (See comments above)
- Look at potential opportunities in the management competency framework to extend the detailed competency definitions for manager roles.

Principle 2.   Taking action to improve the performance of the organisation

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

5.1 Managers can explain how they are effective in leading, managing and developing people.

Managers discussed how they believe they are effective in leading, managing and developing people. Generally, by being accessible to discuss how they can support individuals in this or that role. Some managers described the use of meetings, working one-to-one with individuals or keeping their teams informed through regular meetings. For example, 'by working with people and learning everyday and by being accessible and approachable.'

Indicator met

5.2 Managers can give examples of how they give people constructive feedback on their performance regularly and when appropriate.

In many cases, managers provided examples of how they give people constructive feedback on their performance, regularly and when appropriate. Many cited day-to-day working, appraisal, job chats and meetings. Discussions focus on performance linked to quality standards, raising revenue and overall objectives set out in individual or team action plans.

Typical comments included:
- 'Standards of performance are reviewed with people at appraisals to make sure they are meeting them and delivering to the SOP.'
- 'I have a different approach for different people. I use formal appraisal and documented job chats and I am developing their training records.'
- By giving day-to-day support and discussing standards and supporting, when and if mistakes are made. There are weekly or quarterly objectives set, for example, implementing changes to procedures and standards.'

Indicator met

5.3 People can explain how their managers are effective in leading, managing and developing them

In a number of examples, people explained what their manager is doing to lead, manage and develop them. This included such things as 'being accessible' or 'talking through new ways of working'. Other examples confirmed that people feel more confident of management support and that it had helped them in their respective roles.

Other comments included:
- 'By being kept informed of what's going on. The door is always open.'
- 'If there are any problems I can always go to my manager. He is more approachable and consistent.'
- 'The manager provides ways to improve the team. They have built a good team with good communication'

Indicator met

5.4 People can give examples of how they receive constructive feedback on their performance regularly and when appropriate

Annual appraisal has been undertaken for staff. People gave examples of what they have discussed in feedback. Others explained the part they play in team meetings and how they receive

feedback on improving customer service or successfully delivered functions.
For example: -

- 'My line manager is always discussing my performance and generally she's been very good. I had an appraisal and got feedback on my approach to managing workloads.'
- 'I get feedback when things go well and I can ask and get help on things like recipes or styles of decoration.'
- 'I have appraisals and job chats and how I have managed things like record keeping or debt recovery. I get advice and might use different debt recovery methods.'
- 'In my appraisal I discussed spending more time in *x* and how to answer questions effectively to give more information.'

Indicator met

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

6.1 Managers can give examples of how they recognise and value people's individual contribution to the organisation.

Managers provided a number of examples they are: -

- 'We have general manager tea parties, magic moment awards and give regular praise. On occasions team members may get flowers.'
- 'We thank them personally, share information on the AA report. If anything seen as wrong they can take action through the department. We have monthly meetings to discuss problems and ideas.'
- 'At the staff party this year we had 'hands on' medals awarded to people who are nominated so they can feel valued and, the general manager thanks everyone.'
- 'We had such a good Christmas we had a party for staff as a thank you.'
- 'There is an employee of the year award to recognise people's work.'

Indicator met

6.2 People can describe how they contribute to the organisation and believe they make a positive difference to its performance

People described how they contribute and make a positive difference, for example: -

- 'I am using my experience to develop customer relationships. It gives front of house a friendliness that is natural.'
- 'By feeding information to different departments so events go well, so people are informed and things run smoothly.'
- 'By helping introduce new ways of working'
- 'By always up-selling and training staff.'

Indicator met

6.3 People describe how their contribution to the organisation is recognised and valued

People described how their contribution is recognised and how they feel valued, for example: -

- 'I am included in management meetings although it's not required. I am invited to social events and it makes me feel valued. There is the employee of the month which I won as a result of AA feedback and the contribution to the hotel.'
- 'We have staff days and social events.'
- 'I get a well done after guest compliments are made and there is the employee of the quarter.'

- 'I get compliments from chef and he will let me know if OK. I feel trusted and valued.'
- 'I get good feedback and thanks or a well done.'
- 'I get thanks for my contribution and feel people are recognised. There are compliments, a thank you or well done on the notice boards.'

Indicator met

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

7.1 Managers can describe how they promote a sense of ownership and responsibility by encouraging people to be involved in decision-making, both individually and through representative groups, where they exist.

Managers described a number ways they promote a sense of ownership and responsibility through encouragement and involvement in decision making. In some cases managers discussed the success of involving people in standard operating manuals or developing the corporate brochures. Managers provided examples such as: -
- 'I am lucky to have the backing of the team. They will discuss with the team and make decisions then feedback. For example, using different cleaning materials. I try to encourage them to give ideas to work better.'
- 'We have monthly meetings and hand over meetings. For example, in one we changed the way to do check-ins and people have a say in things. People are taking on more responsibilities, which they enjoy.'
- 'I am developing more delegation and value the staff to make them part of the decision making process.'

Indicator met

7.2 People can describe how they are encouraged to be involved in decision-making that affects the performance of individuals, teams and the organisation, at a level appropriate to their role

In general, most people are encouraged to be involved in decision-making that affects performance. People discussed how they are involved in terms of: -
- 'I have regular meetings and appraisal and discuss what can be improved in things like menus' (Para)
- 'I go to meetings and we talk about the AA actions and how the team can improve check-in.' (Para)
- 'I am given the authority to make decisions where the hotel's standards may not have been met and action needs to be taken.' (Para)
- 'I get a lot of freedom to make justified decisions. I am given the opportunity, for example developing the core standards.'
- 'Putting forward a lot of ideas and changing working practices (for the team and hotel).'

Indicator met

7.3 People can describe how they are encouraged to take ownership and responsibility for decisions that affect the performance of individuals, teams and the organisation, at a level appropriate to their role

In many cases, people feel able to take ownership and responsibility for their part of the business and feel able to make decisions that affect performance.

People typically described examples as: -
- 'I feel more encouraged here than you might be in a larger company. I feel it's a safe place to suggest improvements.'
- 'I have to know what I am doing and make decisions on how to make the best use of resources. I am encouraged by my manager to do this.' (Para)
- 'As a team, we are always encouraged to put forward ideas and make decisions. We can change things if needed, for example, room layouts. It was suggested that we do 'around the world in eighty tastes' as part of wine tasting evening. Staff suggested recipes of their country. The heads of department meeting is good for ideas, it gets the staff involved, and some get a chance to practice their English with guests!'
- 'I am encouraged by my managers. I feel managers back my decisions and, if I do make a mistake it is a safe place and managers will support me.'

Indicator met

Indicator 8. People learn and develop effectively

8.1 Managers can describe how they make sure people's learning and development needs are met.

In many cases, managers can describe how they make sure learning and development needs are met. This included observations, quizzes, and validation via external qualifications, room layout 'testing' or positive feedback from guests.

Learning and development actions are planned and where managers involved people in a follow up, such as observations, are able to ensure learning and development needs had been met.

A trainer follows up Visual-One training and in less formal learning and development actions, people can shadow others and discuss changes to their working practice. Questionnaires have been introduced to 'test' knowledge on key areas such as health and safety.

Typical comments include:
- 'By giving time to practice and doing observations.'
- 'When the training is put into practice there is informal observations and feedback, there might be follow up refreshers.'
- 'I monitor people by working with them, undertaking observations to find out if what is being used is effective and if any mistakes. Feedback is discussed. There are HOD monthly departmental meetings to discuss the team agenda on training and development.'

Indicator met

8.2 People can describe how their learning and developing needs have been met, what they have learnt and how they have applied this in their role

People can describe how their learning and development needs had been met in terms of: -
- 'I did NVQ on food hygiene and how it applies in the work place. There was course work then I completed a test. I learnt about food temperatures and cross-contamination and cleaning down and using colour coded boards.'
- 'I was taken through training by team members and learnt new recipes, dishes and desserts. We can help each other out'
- 'I have done Visual-One and know the system and can identify resources of revenue, we are more informed and what new aims might be to improve. The hotel's systems and

processes run smoothly.'

In some instances, people discussed a follow up on planned learning and development actions or being involved in informal observations to ensure learning and development had happened and they had learnt and applied developed knowledge and skills, for example, setting out rooms or using data.

Typical comments included: -
- 'I have used training records and have been signed off after an observation.'
- 'From the one-to-one I know how to get the best out Visual-One and access information.'

Indicator met

8.3 People who are new to the organisation and those new to a role, can describe how their induction has helped them to perform effectively

There is a formal induction for new staff, which includes 'orientation' from senior managers. There are checklists, plans and manuals for each role or team in the induction process. Where tested people confirmed they felt it had been effective and described their particular induction accordingly.

Where roles are changed, people described the plan for the role and how this fitted with succession planning. Improvements in on-going review within the role (appraisal, meetings and on-the-job discussion) have helped people feel more at ease with their respective change in their role.

For example: -
- 'I was given a tour and the orientation. Objectives were set i.e. to train staff to standards and procedures. I was part of the team and involved in ideas for room layouts.'
- 'I had a week of intensive training. It helped me do my job. I wouldn't have been able to utilise the system. I was shadowed to confirm I was able to do the work.'
- 'I went through the SOP manual with my manager. It was good having the one-to-one. Everything was explained and I was given the opportunity to change my practice.'

Indicator met

Principle 2 - Suggestions for Improvement

- I have little to add beyond developing knowledge and usage of the web site access and building on the actions you have implemented to date, for example action planning from appraisal being reviewed monthly and perhaps formalising some observations..

Principle 3.   Evaluating the impact on the performance of the organisation

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

9.1 Top managers can describe the organisation's overall investment of time, money and resources in learning and development.

Senior management identified the overall investment against financial budgets and their investment in facilities. However, they also explained that, with the level of internal expertise

being utilised, it is not practical to identify specific 'costs' of staff time to some learning and development activities. Further investment has been made in a guest and staff web site to improve communication of human resource information and learning and development activity.

The financial investment is approximately £30,000 and has been increasing year on year at about 15 to 20 percent. Investment in learning and development is supplemented with grant funding and partnership providers. The investment is spread through each hotel to meet mandatory, technical and personnel development strategies

Indicator met

9.2 Top managers can explain and quantify where appropriate, how learning and development has improved the performance of the organisation.

The overall investment in learning and development is measured against key measures in the business. No one particular learning and development action is a predominantly contributory factor. All learning and development undertaken is specifically aimed at the vision of the business and guest service. Appraisal incorporates and evaluation of learning and development outcomes and informs future planning and action plans.

Some performance improvements identified from the collective strategies such as customer care or developing management structures or technical food training are: -

- AA rating improved to 76%
- Revenue at hotels improved with increases in restaurant covers, Christmas bookings year on year improved, events improved year on year.
- Cost savings being made in managing stock levels.
- Quality standards being met consistently across both hotels.

Indicator met

9.3 Top managers can describe how the evaluation of their investment in people is used to develop their strategy for improving the performance of the organisation.

Senior management described 'training and development is vital to bring staff up to higher hotel ratings. It makes the hotel have a competitive edge against others, customer care gives them an advantage and is a cost effective marketing strategy. Therefore there is always a need to put in the training and development resources.'

Some typical comments are:

- 'The management development program last year (2005) of six modules covering skills sets such as customer care and aimed at changing behaviours and attaining consistent management skill did not achieve some of the things it needed to achieve. It is unlikely that we will use that program again. The logistics worked well and the response was OK but inconsistent.' (Para)
- 'The improvements and developments of appraisal, the web site meeting agendas and our management structures have improved the overall performance significantly' (Para)
- 'The involvement of staff in developing the SOP manuals has had a great impact on performance to achieve four star standards.' (Para)

Indicator met

9.4 Managers can give examples of how learning and development has improved the performance of their team and the organisation.

In many cases, managers provided examples how learning and development had improved their team and business performance.

For example:
- 'Visual-One has helped with better marketing and year on year covers have been exceeded by 1000.'
- 'Management development has given more proficient management to set standards.'
- 'Overall training has helped the AA percentage increase by 9% in the year, all from individuals and teams meeting standards.'
- 'Staff development on standards has improved higher staff morale in teams; they are more reliable, based on guest comments which have improved. Returning customers have increased the covers 100%. Our customer base has improved and there are higher levels of recommendations and we are now four stars.'

Indicator met

9.5 People can give examples of how learning and development has improved their performance, the performance of their team and that of the organisation

In my discussions, I was able to confirm that people are able to provide examples of how learning and development has improved performance at individual, team and organisation levels, for example: -
- 'From the training I have improved my capabilities to know how to do recipes improve and enhance dishes. The team can work quicker and have knowledge to help new team members. The hotel can produce higher standards of food and better customer service.'
- 'From the food and drink training I have learnt the standards required, can meet the budget targets and getting more bookings is a good sign of improvements.'
- 'I ensure the food is safe, we have satisfied customers (and more customers) confirmed by the AA target.' (Para)
- 'I am better with customers and wines and able to create a better environment. Things run smoothly, covers are increasing from outside guests so there is increased revenue.'
- 'Team development has meant that we are more organised in what we do and people are working well together.'

Indicator met

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

10.1 Top managers can give examples of how the evaluation of their investment in people has resulted in improvements in the organisation's strategy for managing and developing people.

From the overall investment and development of all staff across a range of provision, senior management provided examples such as: -
- Using evaluation to inform the next steps for management development
- Human resource is developing and being resourced, for example with the web site
- Strategies are being developed to extend the hotel's 'model' for management requiring more systems of work and people development such as management competencies, recruitment and training and development of existing staff.
- The appraisal is more focussed and allows for further action planning in teams and for

individuals.
- People take greater responsibility by being involved in developing the quality standards in the manuals.
- Developing the management structures has improved the access and communication within hotels.

Indicator met

10.2 Managers can give examples of improvements they have made to the way they manage and develop people.

A number of managers provided examples of improvements. They are: -
- 'We are promoting 'hands on' to our customers and staff.'
- 'Personnel files have been updated and provide clearer understanding of the role of staff.'
- 'There is the on-line access for staff and we are introducing the competency framework. There is better cascade of business objective through the meetings, the structure and the agendas.'
- 'The brochure design by teams utilises their ideas.'
- 'There have been massive improvements. Appraisals are better, the casual's appraisal is clearer and the web site with the staff area is accessible for all staff.'

Indicator met

10.3 People can give examples of improvements that have been made to the way the organisation manages and develops its people

People cited better communication in the business. People identified feeling more involved through 'hands on' management and that communication had improved particularly through the middle management structures.

Typical comments included:
- 'Questionnaires are good and they are employing the right people to work as a team.'
- 'The appraisals and managers are getting more support, there is more open management.'
- 'A lot has changed in the last year, appraisals are now in place now and people are more involved, i.e. SOP manuals.'
- 'Appraisals have been revised and are more relevant.'

Indicator met

Principle 3 - Suggestions for Improvement

- This principle is aimed at 'closing the loop' and therefore requires effective communication, engagement and involvement in all parts of the business. Consider my comments in 'areas for development' to ensure that development activities you have undertaken continue to meet the future needs of the business and, that you utilise all your systems, processes and management activities continue to have a robust evaluation of learning and development outcomes against business aims and objectives.

6. Conclusion

Having conducted the assessment in accordance with Investors in People UK and The Assessment Network's guidelines, I am delighted to confirm that **Beales Hotels** is now meeting all the requirements of **Investor in People** organisation.

I extend my thanks to all those who took part in the assessment process for their open and honest feedback in respect of their experience within **Beales Hotels** and their contribution to continuous improvement. It was a very pleasant and enjoyable assessment.

7. Next Steps

Recognition as an Investor in People is subject to reviews against the Investors in People Standard every three years. Therefore, **Beales Hotels** will be required to be assessed no later than **21st February 2010** although it is entirely possible to be reviewed prior to this date. For guidance in respect of future Investors in People review options please refer to The Assessment Network.

- I would recommend that **Beales Hotels** undertake their next review assessment by **21st February 2009** so that, as a whole organisation, review assessment returns to its original timetable post its 2003 accreditation.

8. Recognition Panel Comments

- The panel fully endorses the Assessor's findings and recommendations.

9. Quality Assurance

The Assessment Network Ltd is responsible for the Quality Assurance of this assessment and will invite a representative from **Beales Hotels** 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.
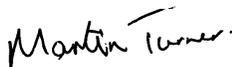
Signed: Martin Turner.   Date: 21st February 2007

Appendix One – Assessment Plan

THE ASSESSMENT NETWORK LIMITED

Assessor: Martin Turner	Date assessment plan submitted:
Project reference: 06/1029	Assessment type: Retaining Review Assessment
Client: Beales Hotels	On site dates: 21st February 2007
Size of organisation:	Scoping size:
Number of sites: 2 Number of sites in scope: 1	Number of sites included within interview sample either by telephone or visit: 1 Telephone: nil On site: 1

Scoping Rationale				
Job Role/Title	Number in scope	To be interviewed	Percentage	By exception note if p/time
Senior Management	3	2	66%	
Managers	7	3	43%	
Kitchen Staff	6	2	33%	Incl P/T
Restaurant Staff	9	4	44%	Incl. P/T & Casuals
Reception Staff	5	3	60%	Incl JC
Housekeeping staff	12	2	16%	Incl. P/T
Conference and Banqueting	3	1	33%	
Maintenance	1			
Porters	2			
Bar Staff	11	1	9%	All casuals
C & B Casuals	21	2	9%	- ditto -
Totals	80	20 19	25% 23.75%	
Number of 1:1 interviews		10		
Number of group interviews		5 4		
Number of telephone interviews		nil		
Additional client specific objectives (e.g. how the assessment will add value for the client.)				
Relevant / useful information for consideration. (e.g. change to organisation structure, new IIP Champion etc.) Note: availability for casuals may be difficult. This retaining recognition review is focused on gaps identified, predominantly within management structures and managing performance, with other areas of the standard being revisited to ensure good practice identified last time continues. If casual staff interviews are limited at the time of the site visit, substitutes from full time management and staff will be made.		Since the last review assessment one hotel has been sold. At the time of the last review one site was a main area of concern for retaining the National Standard across the group. This was as a result of a new build and launch and lack of integrated management and staff applying management practices/activities being consistently in line with the rest of the business. From evidence gathered, the assessor concluded that, if any Investor in People action plan to bring the whole organisation back to the National Standard could be implemented within the current business plan year, then it would only be necessary to re-visit one site. Evidence from the other site would remain current for that period. The assessor is satisfied from information provided at the preparation meeting that it is still only necessary to focus on the this one site. The 'Executive Summary' in the assessor's last report makes clear the rationale required for this further visit based on a lack of consistency 'across all parts of the business' and that the IIP Action Plan provides a basis to gather evidence and bring back in line for whole organisation recognition			