



INVESTORS IN PEOPLE

# **ST COLUMBA'S SCHOOL LTD**

## **INITIAL ASSESSMENT FEEDBACK REPORT**

**COMMERCIAL IN CONFIDENCE**

Assessor: David Hunter

Date: 13 June 2007

## **EXECUTIVE SUMMARY**

**Organisation's Assessment Objectives:** To test the effectiveness of revised personal development approaches. To identify opportunities to continuously improve the way that people are managed and developed.

**Assessor's Objectives:** To clarify if the organisation satisfies the requirements of the National Standard and provide advice consistent with that requested by the client.

**Outcomes:** The Initial Assessment confirmed that St Columba's satisfies all of the requirements of the National Standard. The period since the current Rector took up post has witnessed many changes and these are commented on more fully within the body of this report and against relevant indicators. Significant amongst these however, has been a complete revamp of the approach taken to ensure the continuous professional development of employees and crucially this has extended to non-teaching personnel in recent times. In addition to the personal drive and role of the Rector in championing many improvements, the decision to allocate additional responsibilities to a Depute Rector to manage personal development activity has made a significant difference in the school's drive to achieve Investors in People accreditation. Without this 'appointment' and the considerable efforts made by the individual concerned, it is unlikely that this Assessor would have been in a position to recommend St Columba's for Investors in People status at this time. As it is, this recommendation reflects a very good level of compliance against the requirements of the National Standard.

## **SUMMARY OF FINDINGS AGAINST THE STANDARD**

### **Examples of strengths and good practice:**

- A clear purpose, allied with a set of guiding principles, is taken forward and realised through an impressive Improvement Planning process,- which embraces the whole school and individual faculties (1.11, 1.2)
- Impressively, interviews confirmed that people at all levels are actively involved in and consulted about the development of Improvement Plans. (1.6)
- Learning and development activities (L&D) are aligned to Improvement Plan objectives and discussions with senior personnel identified the key developmental priorities, how these will be taken forward and how the success of such interventions would be measured. (2.11, 2.2)
- Significant change and improvement have taken place in the past year to include non-teaching staff in all aspects of professional development activity. (3.11, 3.2 and 3.3)

- A comprehensive Competency Framework for Managers had recently been developed. (4.1)
- The introduction of Professional Reviews, allied with yearly Personal Development reviews, has greatly improved the quality and frequency with which people now receive meaningful feedback on their performance. (5.2, 5.4)
- In a majority of cases, Managers at different levels were viewed as being very effective and supportive by their staff. (5.3)
- In most cases, people believed that their contribution to the School was appreciated and recognised by Senior Management - although *see the relevant development area*. (6.3)
- A major strength of St Columba's is that people are trained, trusted and empowered to use their initiative and make effective decisions affecting their roles and responsibilities within the School. (7.2, 7.3)
- The quality and variety of L&D interventions is considerable and provides a plethora of means through which people are able to learn and develop effectively. A key strength of the School is the continual sharing of knowledge, experience and the acquisition of new learning amongst personnel. (8.1)
- Impressive changes had been made to the school's induction processes and this has ensured that new employees now benefit from a comprehensive introduction to St Columba's. Discussions with those who had joined the School prior to 2006 strongly suggested that the previous approach was wholly inappropriate. (8.3)
- Whilst still an area than offers scope for improvement, significant changes had been introduced in how the School evaluates its investment in people. **(9.11, 9.3)**

#### **Potential Development Areas:**

Despite the impressive nature of the above, a number of areas were identified where further improvements could be achieved.

- Whilst the Improvement Planning processes are inclusive and impressive, some people were either unaware of, or struggled to identify, 'whole school' improvement objectives. In some isolated instances this extended to a lack of clarity regarding objectives for their area of the School. Such matters could perhaps be more fully covered during 'in service' days and faculty meetings. (1.6)
- Whilst discussions with senior personnel clearly established the key L&D priorities for the School, such information is not recorded in any training plan - as the School doesn't utilise such documentation. The development of such - at an individual faculty (*developed by Heads of Faculty*) and 'whole school' level would greatly improve the manner in which L&D activity is currently planned and taken forward. It would also increase the accountability for such matters at a faculty level. Currently L&D activity, once identified, is simply forwarded to the Depute

Rector for relevant action. It is considered that Heads of Faculty could be more actively involved in the planning of the L&D for their people., and then reviewing the impact of such against pre determined success criteria -which needs to be identified at the planning stage. Currently, the vast majority of such activity, where it occurs, rests almost exclusively with the Depute Rector. (2.1, 2.2)

- Consideration could be given to introducing a pre course briefing process, to be initiated by staff who seek involvement in an L&D activity. Currently, people simply speak to their Line Manager (or vice versa) and the verbal request is conveyed to the Depute Rector to take forward. The suggested change would see individuals identify why the L&D is necessary, what it is it would achieve and how it would improve their performance. (2.2, 2.3 and 2.4)
- Recent months have witnessed the 'rolling out' of processes such as Professional Reviews and attendance at 'in service' events to non-teaching staff. Whilst this has been widely applauded, some people (*very much in the minority*) were cynical that this was purely as a means to help the School achieve Investors in People recognition. Whilst the Assessor believes this is perception rather than reality, Senior Management would be advised to acknowledge such concerns and respond appropriately. (3.4)
- Whilst a Competency Framework (CF) for Managers has been developed and is currently being piloted with some members of the teaching staff, the CF needs to be rolled out across the entire organisation at the earliest opportunity and its profile raised with all levels of staff. Interviews with people at all levels including the Board of Governors, suggested that knowledge of the CF was very limited. (4.1, 4.2 and 4.3)
- In line with the CF criterion being used to measure the performance of Managers in the future, consideration could be given to taking this forward in the form of 360 degree feedback; perhaps initially trialled by members of the Management Team. (5.11, 5.2).
- Professional Reviews take place every three years; augmented by less formal Personal Development Reviews which are a yearly occurrence. In fine with the intended move which will see Improvement Plans being developed every two years, consideration could be given to aligning the frequency of Professional Reviews to a similar timespan. (5.3)
- Rarely has this Assessor witnessed an organisation where people are so committed to their duties and to further enhancing the already very positive reputation of the School. People were also seen to work incredibly hard and in many cases sacrifice significant amounts of personal time to the benefit of St Columba's and its pupils. With this in mind, Senior Management could consider how the School can provide more regular expressions of gratitude and thanks to its people. People, even where they believed that their contribution was acknowledged, believed that scope existed for a greater degree of appreciation to be shown by Senior Management; including the Board of Governors. Isolated comments that senior personnel could be more approachable and visible should also be borne in mind by the school's hierarchy. (6.11, 6.3)
- Whilst communications was seen to have improved in recent years - aided by the introduction of regular faculty meetings, email, newsletters and increased openness, further improvements

were deemed necessary. Examples were provided of instances where not all parties had been communicated to effectively; leading to breakdowns of information, confusion, chaos and disruption. Whilst many of these examples were attributable to individuals simply not keeping all interested parties up to date, people referred to such scenarios as being a daily occurrence and something which needed to be addressed. (7.1, 3.1)

- In addition to above staff in some faculties and in the Junior School, identified that they were only aware with what was happening in their own area and that a greater understanding of 'whole school' developments would be helpful. This could perhaps be rectified, by the Rector addressing people on such matters as part of the agenda for the five 'in service' days' which take place each academic year. (7.1, 3.1)
- Much like the situation with the pre course documentation referred to earlier, scope exists to improve the post course discussions/evaluation that takes place following participation in an L&D event. For example, whilst evaluation forms are issued immediately following a course, this has only a limited value. Where people actually complete such documentation - which is not widespread, comments can only provide initial thoughts on the value of the intervention. The introduction of a process, six months after the intervention, would allow the 'trainee' and line manager the opportunity to provide comment of the impacts achieved - on the basis of actual work experience. (8.2, 9.2 and 9.5)
- Whilst the approach taken with evaluation has improved greatly in recent times, it could be improved further. For example, knowledge of the investment made in developing people is restricted to a limited number of senior personnel. Scope exists for improved clarity on such matters to embrace all tiers of management, including the Board of Governors. With this in mind, regular reports, for example at the end each of each school term, could be compiled and forwarded to the Rector, his Management Team and the Board of Governors. The detail of such reports would include: L&D activity that has been completed and is planned, the spend on such interventions and the impacts achieved to date. The introduction of the aforementioned training plans and the improved accountability for L&D activity at faculty level would also provide a fuller picture of the true level of L&D that takes place, its cost and impact across the whole school. (9.11, 9.3 ad 10.1)

#### **Examples of Benefits Gained from using the Standard:**

Senior Management identified that a major benefit from working with the Standard has been the improved structure and discipline this has brought to help shape how the school improves the manner in which it manages and develops its people.

#### **Conclusion:**

In the Assessor's judgement St Columba's meets all of the requirements of the Investors in People Standard.

A feedback meeting was held on: 13 June 2007.

Attendees: Janet Stevens, Depute Rector

David Hunter, Investors in People Assessor.

The Assessor also reminded the organisation that they must be reviewed again against the Standard within three years. Various options for review are open to recognised organisations and are noted here in brief.

**Review** - This takes place, at most, 36 months after your recognition or last review date, and will be similar to your assessment visit or last three year review visit.

**Streamlined Review** - Enables organisations employing 15 people or less to gain maximum value from their assessment by reducing the reporting requirements. This enables the assessment to be completed within a shorter timescale, and therefore at a reduced cost.

**Annual Review** - Review visits will take place on approximately an annual basis, rather than once every 36 months. These visits will be similar to your assessment or 36 month review but will focus on the areas you perceive as most relevant within the standard or your organisation at each visit, but always ensuring that within three years the whole standard and organisation has been reviewed. Each review will therefore take less time and, in most cases, involve a significantly smaller sample of people.

**Internal Review** - An option which helps recognised organisations monitor their position against the Standard internally by training a small number of employees within your organisation as reviewers. Reviewers operate under the supervision of an IIP Scotland Managing Assessor.

**Profile** - A framework of good practice which provides further stretch for organisations by going beyond the current scope of the Standard. Profile covers a wide range of areas over and above, but linked to the Investors in People standard and provides a much wider range of feedback and the opportunity for benchmarking against other organisations.

For further information please contact Investors in People Scotland (0131 625 0155) or the Investors in People Scotland help-line (0845 606 6000) or access our web site [www.iipscotland.co.uk](http://www.iipscotland.co.uk)

## **DEVELOPING STRATEGIES TO IMPROVE THE PERFORMANCE OF THE ORGANISATION**

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

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

*1.1 Top managers make sure the organisation has a clear purpose and vision supported by a strategy for improving its performance.*

*"The core purpose of St Columba's School is to provide an education of the highest standard for all its pupils".*

The above is encapsulated in guiding principles, which include:

- Providing a broad, balanced and stimulating education, which maximises the potential and personal development of each pupil.
- Providing an education underpinned by Christian values while respecting other faiths.
- Developing and nurturing each pupil's self-confidence and self-esteem.
- Preparing its pupils for the responsibilities, challenges and obligations of citizenship.
- Developing, appreciating and supporting all staff.
- Promoting a national reputation for the pursuit of excellence.

The above is taken forward and realised through an impressive Improvement Planning Strategy; initially introduced by the Rector in the months following his appointment in 2002. This process is now fully embedded throughout the school and is instrumental in outlining strategies and specific objectives consistent with the aforementioned pursuit of excellence.

*1.2 Top managers make sure the organisation has a business plan with measurable performance objectives.*

In support of the school's strategy, detailed improvement plans are in place at a faculty and 'whole school' level. The approach to improvement planning was something which until 2002 was unheard of within St Columba's. That this process is now fully embedded and embraced in all parts of the school reflects positively on the commitment of current Rector to achieve this. It is not the intention of this report to reflect on different styles and approaches of the current and past Rectors. Suffice to say however - and something which all interviewees endorsed, the school now operates in a more efficient, businesslike and successful manner than was perhaps hitherto the case.

Improvement Planning is a truly inclusive process and involves the input of people at all levels within St Columba's. Initially, the Management Team, led by the Rector, provides an overview to Heads of Faculty/Head of Junior School on 'whole school' initiatives. Head of Faculties/Head of Junior School then meet with their staff to discuss such matters and not only provide an input into 'whole school' objectives but also to devise Faculty Improvement plans. The outcome of such deliberations is then fed back to the Management Team and eventually to the Board of Governors for further consideration and agreement - with the final plans communicated to all staff. Such action is initiated one year before the plan comes into action. For example, the 2006 - 2007 Improvement Plan was initiated as far back as August 2005 and finalised in February/March 2006.

Perusal of the current 'whole school' Improvement Plan identified SMART objectives in area such as:

- Implementation of Junior -Senior School curricular liaison.
- The provision of an Environmental Studies Programme which provides balance and progression.
- To embed 'Assessment is for Learning' in all faculties.
- To prepare policy on the 'Able Child' in both Senior and Junior Schools.
- Establishing criteria for a learning programme in the Senior School using 'Learn to Learn' initiatives.
- Investigate the possible use of standardised testing to track pupils' progress in Junior and Senior School.

Impressively, such objectives are complemented by a range of SMART actions, which identify timescales, resources, monitoring points and criteria for success.

*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.*

*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.*

No staff consultation body is in existence; or deemed necessary by either Management or staff.

*1.4 Managers can describe how they involve people when developing the organisation's business plan and when agreeing team and individual objectives.*

As previously mentioned, the development of improvement objectives and plans is an inclusive process. This was perhaps not always the case and before the move to faculty improvement plans and the introduction of regular faculty/departmental meetings, people below management level were not specifically consulted about school objectives.' certainly not in the manner that currently takes place. Again this is

another improvement introduced by the Rector and the development of faculty plans has greatly increased the individual input and involvement of staff, at all levels throughout St Columba's.

Despite the above, some people - whilst fully aware of their own objectives and that of their faculty/department were less able to describe overall school priorities and objectives. Some people were also critical that they knew little of the work undertaken by other parts of the school. Such matters are also commented against 7.1 and as suggested in the Executive Summary, one possible way to tackle such concerns would be to utilise part of the 'in service' days through the Rector addressing colleagues on such matters.

*To put the above into perspective it should be noted that the majority of people were clear on school matters, objectives and what was happening elsewhere within St Columba's.*

In relation to agreeing individual objectives, this takes place during Professional Reviews -which is essentially an appraisal process and is commented upon more fully against 5.2

*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.*

As previously mentioned, against 1.4, a majority of those interviewed were clear about current objectives and the future priorities of their faculty/department and St Columba's and how their role contributed to the achievement of such plans.

## **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 these link to achieving specific objectives and how the impact will be evaluated.*

Discussions with Senior Managers clearly identified where the key priorities lay for L&D activity, such as: 'Learn to Learn'; 'Assessment is for Learning'; and the 'Able & Talented Child'. In addition to the above a plethora of other L&D interventions were planned for and completed during the 2006 - 2007 academic year, including:

- IT training (including ECDL).
- S N A P
- Child Protection
- Health & Safety
- Five 'in-service' days
- SCIS and SQA professional development events.

- Various members of staff pursuing external qualifications, leading to for example: a Certificate in Management; Chartered Teacher status; a Certificate in Careers Education., and an Open University qualification in Geography.

Whilst Senior Managers were able to identify the above and more, consideration should be given to introducing more structure to the process of identifying, planning and delivering against agreed L&D needs. One suggestion which should help with this, is the development of training plans which would clearly describe the.. who; what; where; when; and how much of all planned activity. Typically, information of this type is not formally recorded in a structured fashion at present. Similarly, the identification of how planned interventions will be measured for impact, whilst able to be described, is not recorded anywhere.

Virtually all aspects of how L&D activity is processed and managed is undertaken by the Depute Rector. It is recommended that this situation be reviewed to ensure that, for example, Heads of Faculty and others heading departments are more closely involved in agreeing/delivering/monitoring and reviewing L&D activity for their direct reports. Accordingly, it is recommended that training plans are introduced at a faculty/department level and that these be compiled and managed by the heads of such teams. Such plans would then be forwarded to the Depute Rector to incorporate into an overall St Columba's training plan.

*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.*

Heads of Faculties and, where appropriate, Departments were able to identify the nature of training priorities as these affected their particular area within the school.

In most cases, these mirrored the areas identified against 2.1; such as 'Assessment is for Learning' and the 'Gifted & Able Child'.

In addition, more local priorities included: child protection; first aid; health & Safety; examples of people seeking external qualifications; SEEMIS and SAGE training; food hygiene; COSHH, First Aid; 'Maths for Fun'; and sharing experiences and knowledge with colleagues following visits to schools.

In describing the above, Managers referred to their Improvement plans to demonstrate the link between L&D activities and priority objectives for their faculty or department.

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

Interviewees were able to describe how they were actively involved in identifying and taking forward activities geared to support their agreed L&D needs and how such interventions were consistent with faculty/departmental Improvement Plans. Processes here included: discussions during Professional Reviews and yearly Personal Development Reviews; informal discussions with Line Managers following, for example, classroom observations; or as a consequence of new faculty initiatives, change of roles/responsibilities, new processes - any of which might require a L&D intervention.

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

Interviewees were clear about what their development activities should achieve for them and how it was likely to benefit their faculty/department and/or St Columba's overall.

Without detracting from the above, consideration could be given to introducing a pre course briefing process - where people would identify why they need a particular L&D intervention and how they and the school will benefit as a result. This would increase the onus and ownership of personal development onto staff; rather than, as appeared to be the prevalent view in some interviews, that this was something done for them by Managers. Some but not all people stated that they are aware that there is a joint responsibility between them and their line manager for their development. Ultimately however, people should have overall ownership of the process; it is after all their 'personal' development.

### **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.*

Among many areas that have received the attention and priority of management in recent years has been the creation of an inclusive culture where people, at all levels, are encouraged to contribute ideas and suggestions for improvement. Previously, as identified by a number of staff, "*people just got on with X*" and the production of ideas for change was seen to be the exclusive remit of the then Rector rather than that of teaching or non-teaching staff. The current situation could not be more different. This has been facilitated through, the introduction of regular and structured faculty and departmental meetings as well as improved and more meaningful 'in service' days - planned to achieve specific outcomes. Previously, as one Manager identified, '**in-service' days were more akin to 'providing time for Teachers to clear out cupboards'**".

*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.*

Senior Personnel do recognise and take into account the different needs and learning styles of people and in so doing ensure that access to L&D opportunities is taken forward in a fair and open manner. The variety of ways that people can pursue L&D activities to help them learn and develop effectively is amongst the most varied this Assessor has witnessed. The use of: training courses; shadowing; coaching, visits to schools and countries, external conferences & seminars; distance learning, compute based learning, speed dating (i.e. sharing experiences and knowledge with colleagues); courses leading to qualifications, observation; practical assignments and 'in service' days, all ensure that people can satisfy agreed L&D needs through their preferred style of learning.

This Assessment also noted that where at all practicable, St Columba's does takes account of people's individual circumstances, such as hours worked, career aspirations and family commitments in planning and delivering L&D interventions. The Rector and other senior colleagues provided numerous and robust examples of how the school makes sure that this is the case.

*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.*

Comments provided by those below the Management team echoed much of that described against 3.2 and it would be superfluous to repeat such detail here. Suffice to say however that in every case, Faculty Heads, Heads of House and Departmental Managers were able to provide impressive examples of how they ensure that people receive the training and support they need -and on an even footing with other colleagues

*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.*

People at different levels, including teaching and non-teaching staff and irrespective of gender, hours worked or whether they worked at the Junior or Senior School, supported the comments made by Senior Personnel and other Managers and believed that there was a genuine commitment to equality of opportunity. They also confirmed and described a very fair system where L&D was open to all and that processes such as induction, Professional Reviews, Personal Development Reviews, attendance at team meetings and 'in-service' days were applied consistently.

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

Without exception, people described a culture where they were encouraged to contribute ideas to improve performance through many of the mechanisms already covered earlier in this report; such as Professional Reviews, team meetings, 'inservice days and being asked for ideas for their faculty's Improvement Plan. People also provided examples of where they had made suggestions for change which had been welcomed and acted upon by Management.

Such examples covered both sites, teaching and non-teaching personnel and ranged from ideas for officeladmin processes, ideas for teaching subject areas, items to be included in Improvement Plans and sharing ideas gleamed from visiting other schools and attendance at L&D events.

#### **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.*

The Rector and senior colleagues were able to consistently describe the skills, knowledge and experience that they and Managers needed to enable them in turn, to lead, manage and support their people.

In addition and over the past 3 months, Senior Management had recently developed a set of Management Competencies covering the following areas:

- Managing
- Learning & Teaching
- Managing People
- Managing Policy & Planning
- Managing Resources & Finance

Each area of competence has a number of sub criteria and Managers will be marked against each of these. The competency framework was being piloted with three Managers during the Investors in People Assessment.

Impressive though the above is, the level of awareness of the competency criterion was poor amongst some Managers, including the Board of Governors; whilst at lower levels in the school, people had never heard of Management Competencies or that this would be how the performance of Managers would be assessed in the future. Accordingly, it is recommended that the profile of the competency framework be raised throughout the company. In addition, and whilst recognising that Managers already have their performance assessed against the skills the company deemed as essential for specific job roles, using for example the 'How Good is our School' criterion, it is recommended that all of those who have responsibilities at a Managerial level should have their performance assessed against the new competency criterion in the next academic year.

In relation to how the St Columba's supports the development of its Managers, including those entering newly promoted posts, the Assessor found that the level of support provided, including access to numerous management modules, in - house coaching and mentoring to be very impressive; something which a number of Managers enthusiastically confirmed.

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

Despite a lack of awareness on the development of a competency framework, those with managerial responsibilities were nevertheless able to articulate how they were expected to manage, lead and support people - in line with what the school expected of them.

Typically this included some, if not all, of the areas included in the aforementioned set of competencies.. Communication; People Management; Interpersonal Skills; Planning & Organisation; Leadership.. Presentation Skills and Negotiating Skills.

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

Whilst people were almost entirely unaware of the development of the new competency framework or the detail of individual capability statements, individuals were able to clearly describe what their Line Managers should be doing to lead, manage, develop and support them.

## TAKING ACTION TO IMPROVE THE PERFORMANCE OF THE ORGANISATION

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

### **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 at all levels were able to describe how they managed and supported people.

Examples of action taken by Managers, at different levels and in both sites, and the rationale for taking such action, were impressive. At a basic level Managers explained their role and involvement in providing overall leadership and direction, induction processes, providing very regular feedback on performance, observation and feedback regarding classroom situations, coaching and mentoring individuals, convening regular faculty meetings, providing on-the-job training, helping people with personal/domestic problems; supporting studies leading to external qualifications, arranging visits to schools and overseas development opportunities to broaden people's experience. The list, if not endless exceeds the examples provided in this paragraph.

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

Providing regular and meaningful feedback on performance is an area in which the School has improved in recent years. Prior to 2003 the provision of such would have been seen as an area of weakness; now it is a strength. In 2003 a Professional Review and development process was introduced for all teaching staff and training was provided in reviewing and giving feedback in May 2003 for all teaching staff as Reviewers and/or Reviewees. Following the successful completion of the three-year review cycle, the process was amended slightly and in January 2007 a new cycle of the review process was introduced and for the first time Professional Reviews embraced all staff; teaching and non-teaching. Information meetings took place in both Junior and Senior School for non-teaching staff and training sessions were delivered during November and December 2006. Whilst Professional Reviews take place at three yearly intervals, Personal Development Reviews are also convened on a yearly basis.

As identified with the Executive Summary and in tandem with changes planned for the Improvement Planning cycle, consideration could be given to changing the frequency of Professional Reviews to every two years.

As a further means of providing appropriate feedback to staff, including Managers, consideration could be given to introducing a 360 degree mechanism, where people could receive feedback from their Managers, peers, and team members. Perhaps this could be initially trialled with members of the Management Team?

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

It was impressive to find in virtually every case, that interviewees were extremely positive about the quality of management support they received from the Rector, his Management Team and others such as Heads of Faculty and the Head of the Junior School.

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

Interviewees in every case confirmed the statements made against 5.2 regarding how Managers provide regular and meaningful feedback on performance.

## **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 at all levels were fully aware of the need to demonstrate their recognition and appreciation of people. They were also acutely aware, particularly in the teaching profession, that people come to work not simply as a response to financial incentives. That said, teaching staff receive a 3% premium on top of nationally negotiated rates when they join St Columba's from the State Sector.

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

Interviews confirmed that everyone clearly understood what they contributed to St Columba's and how by their efforts they could make a real impact on the education of pupils and in so doing further enhance the reputation of the school

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

In acknowledging their role and contribution, a majority of interviewees were able to provide examples on how the school acknowledges and expresses its appreciation of people. This manifested itself in many forms, such as: personal thanks from the Rector and Management team colleagues; instances of internal promotion; being supported with personal development which then led to success in applying for higher level posts in other schools (*not an uncommon occurrence at St Columba's*), support to *achieve* external qualifications, kindness and consideration over personal/ domestic situations, receiving gifts at *Christmas* and being thanked at/within assemblies/faculty meetings/newsletters.

Although very much in the minority, some people - even where they felt they did receive some recognition, believed scope existed for a bit more of this - particularly from Senior Personnel.

## **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.*

Another key strength of St Columba's is the manner in which people are encouraged to carry out their daily duties and responsibilities and make decisions without the need for constant referral to more senior colleagues. The Rector, understandably, has high standards of service excellence and there are clear protocols about how people should operate and interface with pupils and their parents/guardians. Teachers and non-teaching staff however are trained and supported to make the right decisions and in many respects are self-reliant.

A key aspect that affects how people can work independent of close supervision and instruction is having the right information available at the right time; therefore internal communication channels and processes need to be of a high level and work. Interviewees were largely very positive that internal communications had improved in recent years and Managers identified that this has resulted from the advent of email, the 'T' drive, regular team, for example, faculty meetings, improved structure and content to 'in-service' days, the introduction of Professional Reviews, a more open and transparent culture and the use of memos and school newsletters.

*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 that is appropriate to their role.*

In virtually every case, people acknowledged the culture described against the previous evidence requirement, for example improvements to communications, and in so doing provided apposite examples of being involved in decision-making at a level that is appropriate to their role.

Despite the above, a number of people cited examples of complete communication breakdown; typically where not all parties were given the same information at the same time. This was referred to as a daily occurrence and a matter of considerable frustration.

*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 that is appropriate to their role.*

In line with comments made against the previous evidence requirement, people not only are encouraged to make decisions, they are expected to take full responsibility and ownership for such matters and any actions they take. Consistent with the quotes shown against 7.2 and in many other instances, those involved were comfortable to be held accountable for decisions and suggestions they made.

## **8 People learn and develop effectively.**

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

As identified within Indicator 2, the process of agreeing L&D needs take place during Professional Reviews, Personal Development Reviews and at other times during the academic year where the need for a training input becomes evident, for example, following a classroom observation.

Thereafter the sourcing and planning of activities to meet agreed needs is followed through, almost entirely, by the Depute Rector responsible for the school's personal development strategy. As mentioned elsewhere there is considerable scope for Heads of Faculty and other department heads to become more involved and assume accountability for matters concerning the personal and professional development of their team members.

Rarely has this Assessor come across such a variety of different approaches to L&D that enable people to learn and develop effectively and in accordance with agreed developmental needs. This includes a plethora of internal resources and approaches, including a development library, coaching, mentoring, 'in-serve' days' visits to other schools (indeed other countries), in-house training courses, external courses, seminars and conferences, opportunities to achieve external qualifications and the very impressive culture where people openly share their knowledge, experience and learning with colleagues. The Assessor was also impressed to find that the provision of training and other forms of developmental activity is provided at the right time, for example, people are able to put the acquisition of new skills and learning into practice immediately on return to the school.

In relation to taking a view that people are developing and learning effectively the school is well placed to do this through mechanisms such as: HMI Inspection feedback; feedback from parent surveys; classroom observations; people's ability to train colleagues on what they have learned; the baseline performance of pupils; examination results and the ability of Teachers to move into promoted posts within and outwith St Columba's.

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

People confirmed, in every case, that they had benefited from their attendance on training courses (or other forms of developmental activity) and how they had transferred their learning into their daily routines.

Such clarity not only reflected the high quality and variety of training which people benefited from but also the important emphasis that exists on reviewing the course or activity in question, during for example Personal Development Reviews. In some instances, people openly discussed their training with colleagues at faculty meetings. This was seen to benefit everyone in the team; not just the participant.

In addition to post course discussions - which were seen to happen in most if not all faculties/departments and the completion of post evaluation sheets and WD evaluations - which was largely the exception rather than the norm (and which seemed to involve *management spending an inordinate amount of time chasing - up staff. something again which should be managed within faculties*) consideration could be given to augmenting the current evaluation process. The introduction of a process, six months after the intervention,

would allow the 'trainee' and Line Manager the opportunity to provide comment of the impacts achieved - on the basis of actual work experience.

*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.*

The induction provided to 'new starts' - whether permanent or those employed on a temporary or part-time basis, as well as job changers and promotees was extremely comprehensive. This had not always been the case however.

Now the situation could not be more different, with a comprehensive checklist managing the induction programme with key inputs from Personnel and Line Managers. Regular meetings also take place with the Depute Rector on progress being made and the identification, as appropriate, of the need for further training interventions. In relation to teaching staff, their first year in the school is supported very positively by coaching, mentoring and regular classroom observations to help them adjust to their new employment and to successfully navigate their registration period.

## EVALUATING THE IMPACT ON THE PERFORMANCE OF THE ORGANISATION

*(An Investor in People can demonstrate the impact of its investment in people on the performance of the organisation)*

### **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.*

Interviews with senior personnel demonstrated a sound awareness of the company's investment in people. Below this level, for example Heads of Faculty, and also in relation to the Board of Governors, the level of awareness was patchy and suggested that improvements could be made on the reporting of such matters to all levels of management throughout the school.

The school operates within an overall development budget which meets the direct costs of CPD and other developmental activities. The use of a budget however is not a limiting factor and where the amounts available need to be exceeded this will involve the agreement of the Board of Governors.

I reviewed a recent report on the level of spend in the academic year to date and it was impressive to see that not only were direct costs taken into account but that indirect 'expenditure' such as staff cover costs and 'time and opportunity costs' associated with in-house activity were fully recognised. Again however scope exists for information of this nature to be reported to all tiers of management.' where awareness of the school's investment in people is largely restricted to direct costs and items of expenditure brought to account against the budget.

The introduction of training plans at faculty/department and 'whole school' level will help to present a fuller picture of the considerable amount of L&D activity that takes place as well as the direct and indirect costs associated with such.

In line with earlier comments above, some scope exists to provide more regular and detailed reporting on all aspects of L&D activity to the Board of Directors and the Management team not just on costs but also on all aspects of L&D activity i.e. planned/completed interventions, the total cost of such and success stories identifying how the school's investment in its people has impacted positively at a individual/faculty/department and 'whole school' level. It is suggested that such reports could be produced at the end of each of the three school terms. A wider circulation of such documentation would also serve to demonstrate (to the entire school) the considerable investment made by St Columba's in developing its people and the successes achieved as a result.

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

The Rector and other senior staff were able to provide very strong examples of where the school's investment in its people had impacted positively on performance.

*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.*

The Assessor had no doubt that the evaluation runs across every facet of how St Columba's operates; including using lessons learnt through investing in its people to develop its overall strategy for improving the performance of the organisation.

In relation to how the evaluation of L&D activity takes place, this is done in a number of ways, including:

- Discussions with staff during Professional Reviews and Personal Development Reviews.
- Post course discussions
- CPD evaluation.
- Faculty/class/subject examination results.
- Post course evaluation.
- Analysis of the post course questionnaires used by external providers.
- Analysis of individual/faculty/department and 'whole school' performance against Improvement Plans.
- Review of parent/pupil feedback, including any complaints.
- Observation of classroom practice.
- Consultations with staff regarding any new process or changes to existing processes.

Specifically in relation to areas where the evaluation of the school's investment in people has helped shape its future strategy for improving performance, these are many and included:

- 'Learn to Learn', 'Assessment is for Learning', 'The Gifted and Able Child': In each of these cases the initial training and the evaluation of the benefits accrued have led to the adoption of these approaches throughout the school.
- Visits to schools/overseas countries. The evaluation of the positive outcomes from such activities, including the sharing of knowledge and access to best practice has led to a greater level of activity in these areas which already has proved beneficial to the school, its people and pupils.
- The piloting of Management Competencies is another example of where the school has (or is in the process of) reviewing a major initiative which will be rolled out across the school. The pilot process will help the school to refine and improve the process before it is widespread application.
- Scholar The involvement of the school in the Herriot Watts' E Learning programme and the evaluation of its benefits, have directly led to Teachers having more and better examination

revision material available for 5<sup>th</sup> and 6<sup>th</sup> year pupils to encourage independent learning and to further improve success in examination results.

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

Managers, at different levels, echoed the examples provided by more senior colleagues against 9.2. In addition, such individuals provided a more local perspective on the impacts achieved from L&D activity.

*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.*

Teaching and non-teaching staff provided numerous and good examples of how their participation in L&D activities had improved their confidence and performance as individuals and impacted positively on their faculty/department and St Columba's.

## **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.*

The whole approach to how St Columba's supports and develops its people was reviewed when the current Rector took up post and fundamental changes have taken place - particularly in the period since a Depute Rector was charged with taking overall responsibility for training and development.

The Rector took up post in the aftermath of a HMI inspection (*where he was part of the assessment team*). The findings of the inspection were largely critical in nature. A further inspection at this time would undoubtedly reach different conclusions and the changes implemented in the period since the last and follow-up HMI inspection reflect most positively on the work of the Rector; something which colleagues, staff and the Board of Governors paid tribute to during this assessment. Fundamental to the changes that followed thereafter was the development of an Improvement Planning process; something which (*nor anything like it*) had been in place prior to the Rector's appointment. That there was some initial resistance to the introduction of Improvement Planning, amongst teaching staff, now seems difficult to believe as this process is fully embedded and is fundamental to everything that the school is striving to achieve. Other changes that have flowed from the ongoing evaluation of how the school invests in its people include:

- Contracts of employment for all personnel.
- Improvements in the induction provided to new employees.
- The introduction of Professional and Personal Development Reviews.
- The advent of working groups across the school.
- Improved communications through the introduction of management/faculty/departmental and meetings, the development of a 'T' Drive and greater use of Email.
- Improvements to the structure and content of 'in-service' days.
- The creation of a Staff Development Policy.

- The introduction of a post, at Depute Rector, to oversee all matters concerned with Professional and Personal Development.
- Increased focus on CPD with associated evaluation processes.
- Greater inclusive of non-teaching staff, for example, such personnel now benefit from Professional Reviews.
- Increased use of review and evaluation mechanisms, and employee input, regarding new processes or changes to established procedures.

*NB: The above is an indicative rather than definitive list of the changes made in recent times.*

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

In addition to echoing changes such as those identified above, Managers at different levels provided impressive examples of how they had improved the manner in which they managed and developed their people.

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

Interviewees, echoing much of the comment made against 5.3, were extremely positive about how they are managed and supported and confirmed the improvements identified by Managers against 10.1 and 10.2. For example, people identified progress in areas such as: Induction. Professional Reviews, CPD activity, communications and in-house training., as well as referring to increased openness, trust and a greater delegation of responsibility.

## BACKGROUND INFORMATION

**Organisation:** St Columba's School.

**Nature of Business:** Education.

**Ownership:** Charity.

**Number of People in Scope:** 141.

**Number and Location of Sites:** Two sites - both in Kilmacolm.

**Organisation Structure:** A Rector reports to the Board of Governors. The Rector in turn, is supported by a Senior Management Team comprising: a Senior Depute Rector; two Depute Rectors, a Head of Junior School; a Depute Head of Junior School; a Senior Master and a senior member of staff responsible for Marketing and Development. Below this level are Heads of Faculties, Heads of House, Teachers, Technicians, a Librarian, Classroom Assistants, Administrative Staff, Kitchen Staff, Cleaning and Janitorial Personnel.

**Recent History:** St Columba's opened, as a girls only school in 1897. By 1980, the school catered for boys and girls. Significant change has taken place since the appointment of the current Rector in 2002. Many of these changes have impacted, positively, in the organisation moving towards Investors in People accreditation. For example, the establishment of a Review process for Senior and Junior School teaching staff has seen a much greater emphasis on the arrangements surrounding staff development activities. This was a major 'sea change' for the School as previously teaching and non teaching personnel did not benefit from participation in personal development activities. This change in culture took a couple of years to be fully embedded throughout St Columba's although senior personnel believe that the changes made (and the benefits which have accrued from these) have resulted in the vast majority of staff 'buying into' the school's new ways of working; something which the SMT was hopeful the Investors in People assessment would confirm.

## ASSESSMENT PROCESS

**Number of Assessment days:** 4.50.

**Last Day on Site:** 13 June 2007.

**Sources of Evidence Used:** The client provided a detailed, relevant and impressive portfolio of written material.

### Interview Sample:

11P UK Guidelines for this size of organisation recommend that 10 - 20% of those in scope are interviewed. The sample here was 27 people, representing 19%.

Profile of those in scope			Profile of sample	
Role	Number	%	Number	%
Board of Governors	10	7	2	7
Senior Management Team	8	6	3	11
Heads of House, Faculty & Departments	12	8	3	11
Teaching Staff	50	36	7	26
Music Tutors	11	8	1	4
Technicians/Librarian	4	3	2	
Classroom Assistants	5	3	1	4
Admin/Finance Staff	15	11	3	11
Kitchen & Cleaning Staff	16	11	3	11
Janitorial Staff	10	7	2	7
<b>TOTAL</b>	<b>141</b>	<b>100</b>	<b>27</b>	<b>99</b>
<b>Categories</b>				
Male	34	24%	9	33
Female	107	76%	18	67
Part-time	30	21%	5	19
New Employees	12	8%	3	11
<b>Numbers interviewed by each method:</b>			Individuals	18
			Pairs	4x2
			Groups	
			By Telephone	1
Total no. of sites	Two	No of sites covered	Two	