



Investors in People: A critical review and evaluation of the Standard with regard to its commercial application in organisations

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Executive Summary

- Available research indicates that there is little evidence that Investors in People accreditation leads to tangible commercial benefit, and therefore the claim that it is a business improvement tool is open to question and potentially without foundation
- The Investors in People Standard is a process framework, primarily based on training despite revisions
- Organisations attempting to comply with the Standard run the risk of misdirected investment and/or potential over-investment
- The current iteration of the Investors in People Standard (10 indicators) does not appear to have any material business case and therefore casts doubt on the degree to which it links to business performance
- It is difficult to substantiate IIP's claim that accreditation as an Investors in People organisation has any practical value for organisations
- The process of assessment raises many questions around the degree of consistency and quality in the award of Investors in People status, particularly around underlying assumptions, definitions and individual assessor interpretation
- The overly long and inappropriate 3-year assessment cycle, given the dynamic nature of organisations and people management
- The value of the badge (given the limitations of the 'pass/not pass' scheme) is diminishing as more organisations have obtained Investors in People status (though 'badging' still appears as a driver for involvement)
- The Standard is not a sufficiently robust vehicle for organisation development (and in fact can be misleading) though this is the prime marketing message to organisations
- In terms of medium to large employer organisations, there is a heavy bias towards the public sector
- Investors in People as a private company receives c. £5m in direct grants and aid, of which £1.8m is spent on marketing, £1.6m on staff and £0.9m on administration
- Since 1997, the organisation has been supported by £32million of public funds, though funding is not assured after 2007¹
- In 2005, IIP was named as one of the top nine "most useless" quangos²

¹ Source: Investors in People UK annual reports

² Source: Essential Guide to British Quangos 2005, reported in Personnel Today, 11 February 2005

In light of the evidence, we conclude the following:

1. That the aim of targeting a specific percentage of the UK workforce has been at the root of increasing efforts (and expenditure of taxpayer funds) to maintain the Investors in People UK organisation and market an insufficient Standard. This target should be withdrawn. If industry sees Investors in People as a meaningful product, it will continue to purchase it. If not, the Investors in People UK organisation and network of Regional Quality Centres and independent Advisers/Assessors can be scaled back. This creates the alternatives either of increased savings to the public purse, or of distributing a proportion of the c. £5m grant and related funding currently supporting Investors in People UK operations as individual training grants to small businesses.
2. Given the issues around skill gaps identified and the questions raised around the organisational relevance of aspects of the current Standard, Investors in People should accordingly withdraw from their claims and attempts to provide a 'business performance tool' with advisory support, instead ensuring that organisations continue to benefit from a consistent approach towards development.
3. That the Profile framework is not only unsuited to any meaningful commercial application within large organisations, but has the potential to result in skewed company decision making and result in poor allocation of internal resource. This should be withdrawn. This will result in the dissolution of the joint venture with Penna plc that currently provides Investors in People Corporate Solutions, on the grounds that it is surplus to requirements and creates an artificial barrier to organisations accessing more expert suppliers.
4. In view of this, the additional models (Leadership & Management, Work-Life balance and Recruitment & Selection) should be dropped. Review of internal Investors in People UK documentation shows that take-up of the separate Leadership & Management and Work-Life balance modules has been "disappointing", with 14 and 9 recognitions respectively³. This would indicate that industry sees no relevance for these accreditations.
5. That a role still exists for Investors in People UK and the Standard in line with the original remit, in ensuring that organisations possess baseline processes for effective development of their employees. This is given particular contemporary relevance through increased concerns around declining standards in baseline skillsets in young people/graduates entering the workforce, particularly in terms of literacy and numeracy. We note an apparently increasing level of focus on schools, where the introduction of baseline training approaches may well bring benefit⁴.
6. Whilst other, more scientific and rigorous tools exist to evaluate the linkages and impact between individual development and people management practice, Investors in People still appears to have some role to play in assuring that small businesses can benefit from effective baseline training approaches.⁵
7. The introduction of other people management Standards (as noted above) raises the question of grant/fund allocation, and the prospect of a 'market' tender process rather than an automatic 'right' granted to Investors in People.

³ Source: Investors in People UK 2004-5 Business Plan, April 2004

⁴ As evidenced in the inclusion of a number of case studies within the sector; its identification as a key focus areas in the Investors in People UK Business Plan 2005-06 and in a response to a House of Lords question, December 2005 (Source: Hansards, 5 Dec 2005, Column WA78).

⁵ See accompanying International School of HCM whitepapers relating to evaluative approaches towards human capital management, VB-HR™ Rating and the HCM Standard (www.hcmiglobal.org)

Investors in People UK – the organisation

Investors in People UK is a non-departmental public body that receives in excess of £5million annually from the Department for Education and Skills. The organisation employs 43 people and has 14 Directors and 3 Observers.

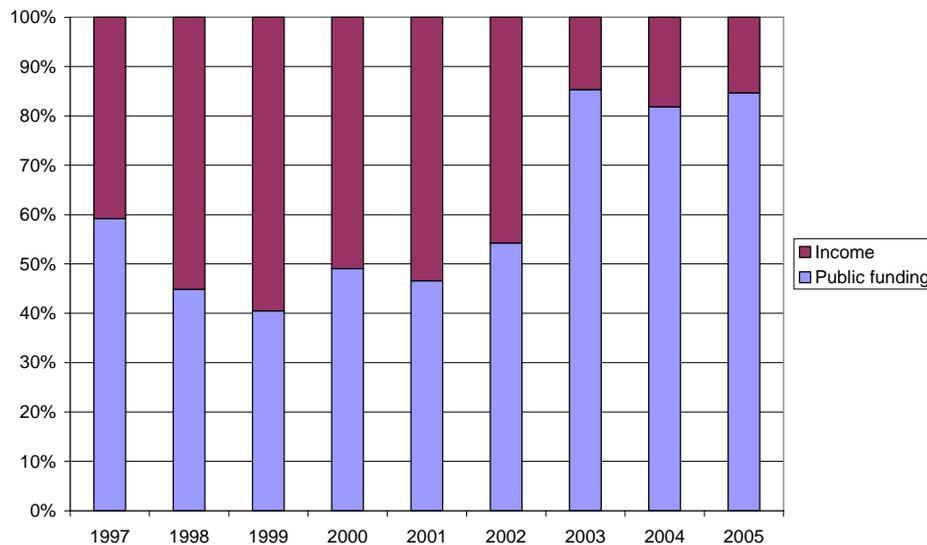
Since 1997, the organisation has been supported by £32 million of public funds⁶. This is in addition to any grants and financial incentives made available to companies applying for Investor in People status, through subsidised use of the consultants who assess and work with the organisations that implement the Standard.

This in itself raises several serious issues. Given the extent of the network⁷ of IiP advisers, assessors and other associated personnel, IiP is effectively a state-funded monopoly which is distorting the HR advisory market⁸.

Further, the use of subsidised funding may be having an adverse effect on its intended design, i.e. the association that people related matters do not rank as important as finance, IT, or marketing, for example, where there are no similar Standard-type schemes.

The Investors in People UK organisation has become increasingly reliant on taxpayer funding for its survival, as the table below shows.

Investors in People UK gross annual income



In the last three years, income from operations has sharply declined, now representing less than one fifth of the organisation's gross income.

This would suggest that the organisation is extremely reliant upon public funding, despite its proprietary status and efforts to license the Investors in People Standard internationally.

⁶ Source: Investors in People UK annual reports

⁷ Over 1500 as stated in the Investors in People UK annual report 2004-5

⁸ See Investors in People – A preliminary assessment of competition effects of government subsidy, VaLUENTIS Ltd 2006

Further inspection of the latest accounts (2004-5) provides some interesting findings. Of the c. £5m received in grants and aid, £1.8m is spent on marketing, £1.6m on staff and £0.9m on administration.

This would suggest that IiP is primarily a marketing agency, rather than a standard setter.

If this is the case, then questions need to be raised regarding its remit and positioning vis-à-vis the general perception within the market-place, particularly in light of what amounts to a state-funded monopoly.

Investors in People UK delivers the Investors in People Standard and assessment through a regional network of sub-contractors who are largely independent. This structure creates certain issues around quality and consistency.

An independent observer may raise an eyebrow and ask a valid question: is the Standard there to assist employer organisations or to subsidise the large associated network of independent IiP assessors and practitioners, many of whom are 'one-man bands'?

Original intention

The original driver for the establishment of the Investors in People standard was a governmental concern that the UK lagged internationally in terms of both competitiveness, and training & development expenditure.

Following the 1985 report 'Training in Britain', the Investors in People standard was developed during 1990 by the National Training Task Force in partnership with the Confederation of British Industry and The Trade Union Congress.

It was managed by the Department for Education and Employment (now the Department for Education and Skills), and subsequently tested by regional Training and Enterprise Councils, and Local Enterprise Councils.

Investors in People UK remit

The remit of the Investors in People UK organisation, therefore, includes promoting the IiP Standard within the UK and abroad, with the explicit target of ensuring that 45% of the UK workforce is employed by organisations with or working towards the Investors in People Standard by December 2007.

We note that this remit appears to focus on the somewhat arbitrary, input-type target, of workforce coverage. We would argue that a more output-driven target, such as productivity or performance, would be of more benefit.

A document released by the Office of the Deputy Prime Minister in 2005 put coverage of the UK workforce at 29%, implying considerable shortfall against the 2007 target.⁹

Other figures of workforce coverage, however, further complicate assessment and raise concerns.

Given the nature of Investors in People's workforce coverage target as the apparent justification for its existence, its 2005-06 business plan identified issues around the data

⁹ Transforming the organisation, improving performance: the local government pay and workforce strategy 2005, paragraph 79. Office of the Deputy Prime Minister

maintained, leading to Investors in People downgrading their actual workforce coverage from 39.4% in December 2003 to 37.4% in March 2005¹⁰.

In addition to the issues of data quality, external analysis of the degree of take-up of the Investors in People Standard is exaggerated by two factors:

- Business units, directorates or even branches within the same organisation can hold Investors in People status individually, thus increasing the total number of recognitions.
- For example, one NFP organisation has over **50** 'recognitions', a County Council has **11** separate recognitions, whilst a private sector organisation has **24** related to different branches/units.
- As an illustration of the impact of this, data provided by Investors in People UK identifies 1,013 recognised organisations with more than 1,000 employees. Review of this for unique organisations puts the number closer to 830, i.e. 17% duplications.
- Further analysis of the total 'recognitions', indicates there are c.10% duplicated organisational entries¹¹ out of the total of 39,126.
- The headline number often presented relates to "committed organisations" – i.e. those who have indicated a (non-binding) commitment to achieving the Investors in People standard within two years. This is not the same figure as "recognised organisations" – i.e. organisations holding Investors in People status. To illustrate this, 35,000 commitments were acknowledged in 1998 but only 8,825 organisations were recognised as holding Investors in People status¹².

The evidence, and limited transparency around levels of take-up, in light of the Office of the Deputy Prime Minister assessment, suggests that the Investors in People organisation is struggling to meet its (apparently arbitrary) target; and that the different ways of counting penetration of the Investors in People Standard are intended to reduce transparency around the actual rate of its take-up.

Take-up of the Standard and implications for Investors in People UK

Review of the historic levels of take-up of the Standard sheds light on the potential rationale for recent changes in the Standard and increasing efforts on the part of Investors in People UK to position it not just as a training process assessment but as a business performance tool.

Despite some initial success in promoting the Standard, 1998 marks a turning point in industry's apparent enthusiasm.

The graph below demonstrates how, from this period, the percentage change in recognitions from the previous year declined (following a steady and consistent downward trend), suggesting that the Standard effectively reached saturation within the market.¹³

¹⁰ Investors in People UK 2005/06 Business Plan, FINAL, April 2005

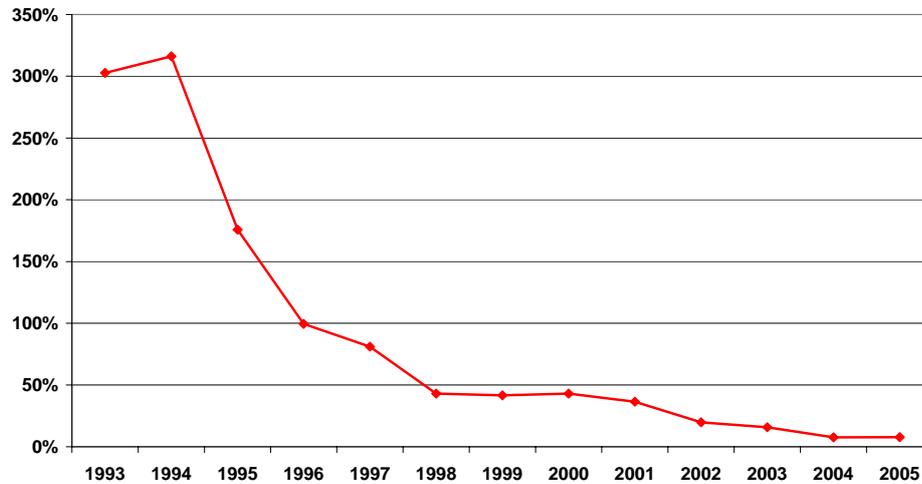
¹¹ Based on sample of 2500 organisational entries - as IIP database does not automatically register multiple entries of same organisation name

¹² Source: Investors in People Annual Reports

¹³ Source: VALUENTIS analysis and calculations based on data available within Investors in People UK annual reports

Annual change in take-up

% change in recognitions from previous year



This steady decline, representing the characteristics of a typical product 'maturity curve', is problematic for the Investors in People organisation, with the remit of ensuring that, by December 2007, 45% of the UK's workforce is employed by organisations that possess or are working towards Investors in People standard.

As further context on the implications of this decline, an independent academic study concluded that obtaining the Standard became significantly easier between 1991 and 2001¹⁴.

In light of the decline in take-up and continued insistence on the (perhaps unrealistic) target of 45% of the UK workforce to be covered by the Investors in People Standard, a question remains as to the way forward for Investors in People UK.

Changes to the Standard

Following high levels of consistency over the first decade, since 2000 there have been several wholesale revisions and apparently unwarranted 'extension' of the initial Standard into areas unrelated to training, raising questions both around the ongoing relevance of the Standard, and, indeed, whether the Standard represents a 'standard'.

Given the three years that organisations can take between accreditation periods, it is now possible for two current Investors in People organisations to have been legitimately assessed under different 'versions' of the Standard, calling into question the uniformity of approach and devaluing the nature of any accreditation.

This sustained level of change, both to the Indicators used in assessment for the Standard, and the offering provided by Investors in People, suggests two key themes.

Firstly, whilst it might seem reasonable to review a Standard over a ten or fifteen year time-frame, the pace of activity, with two wholesale changes to the Standard itself within four years, suggests some deeper underlying issue with the validity or usefulness of the construct.

¹⁴ How long until we get there? A survival analysis of the Investors in People initiative 1991-2001. Fernandez, R.M., Taylor, S. and Bell, E. SKOPE Research Paper No. 56 July 2005.

In light of the decline in take-up already identified and collapse of Investors in People UK's commercial income from 2002, this level of activity suggests a reaction to market indifference in the Standard.

Secondly, the evolution of the offering has now moved significantly beyond the training and development arena.

Review of the indicators shows that the original indicators simply assessed the presence of 'best practice' approaches towards training. As an example, "Objectives are set for training and development actions at the organisation, team and individual level".

The 2000 and 2004 indicators and assessment regime have moved away from this factual approach and into the broader arena of HR management. We observe that the underlying theoretical and practical underpinning for such a change is not clear, and accordingly have concerns that the Standard is now described as providing "good practice" in broad areas of people management without any apparent evidence in support of its application in this area.

It would therefore appear that Investors in People UK have arbitrarily changed the Standard to stimulate additional demand in the marketplace.

Public sector focus, private sector indifference?

We have seen how the Standard has been revised twice within five years, apparently in an attempt by Investors in People UK to overcome market indifference and maintain some progress against its objectives of workforce coverage.

Given its close relationship with the public sector and the scales of the public sector workforce, (for example, the NHS is identified as the world's third largest employer), it is perhaps not surprising that Investors in People UK has achieved large differentials in take-up rates between public sector and private sector workforces.

"Investors in People (IIP) has become recognised as a methodical, externally verified standard, which demonstrates that staff development is fully integrated into organisational development. IIP coverage of the local government workforce reached 74% in 2004. This compares well with the UK average of 29%."

Transforming the organisation, improving performance: the local government pay and workforce strategy 2005. Office of the Deputy Prime Minister.

An independent study into Investors in People accreditation across the 120 local councils holding the award by August 2001 found that 74% of the respondents introduced Investors in People as a result of a corporate policy initiative¹⁵. This could be interpreted as being an outcome, not of any commercial decision, but of policy guidance and/or indirect governmental influence or suggestion.

It is of interest, given that three quarters of the local government workforce are employed by 'Investor in People' organisations, the current issues identified in the Local Government Pay and Workforce Strategy 2005 around organisation development, leadership capacity, workforce skills, resourcing and reward would seem to contradict or at least call into question any claimed organisational benefits of Investors in People status.

¹⁵ Berry, C. and Grievies, J. "To change the way we do things is more important than the certificate on the wall": Does Investors in People represent an effective intervention strategy for organisational learning? *The Learning Organization* Vol. 10 No. 5, 294-304 (2003)

Whilst we believe that accreditation in the Investors in People Standard may be better than no accreditation, for the purposes of introducing effective people management processes, at some stage it seems likely that diminishing returns result from its introduction.

As the Standard is not evaluative, but rather a process quality tool (which engenders a 'tick the box' mindset), it becomes difficult to ascribe value to its implementation, questioning the extent to which it should penetrate a particular sector.

Whilst the public sector appears to have adopted the Investors in People Standard with some enthusiasm, or have at least gone about its adoption as a matter of policy, the same cannot be said of UK private sector organisations.

Review of the December 2005 Investors in People UK's database of recognised organisations shows that, of FTSE 350 organisations (i.e. the largest listed UK companies), 13 hold full Investors in People accreditation and a further 31 hold partial accreditation.

We note that the partially accredited organisations range from full business units to Head Office HR functions.

This indicates that Investors in People have achieved a penetration rate of 3.7% for full accreditation amongst 350 leading UK companies. This figure rises to 12.6% if partially accredited organisations are included: a clear differential against either the 29% takeup identified by the Office of the Deputy Prime Minister, or the local government workforce coverage of 74%.

Indeed, the 2005-06 business plan for Investors in People appears to acknowledge its own failure to generate traction in the private sector through its choice of sectoral focus:

- Health
- Education (particularly Schools¹⁶)
- Central and local government
- Construction
- Retail
- Financial services.

"Perception [exists] that the standard is for smaller organisations, less developed organisations who need basic guidance in people development and public sector organisations with productivity issues (that the standard is seen as 'government controlled' merely adds to the latter perception)."

Source: Investors in People UK 2004-5 Business Plan, paragraph 4.3.1

Accordingly, this starts to raise questions about the commercial benefits and credibility of the Standard, that are explored further within this review.

¹⁶ Education was identified as an area of increasing focus for Investors in People, in a response to a House of Lords question, December 2005. Source: Hansards, 5 Dec 2005, Column WA78.

The evolution of the Standard

The original driver for the establishment of the Investors in People standard was a governmental concern that the UK lagged internationally in terms of both competitiveness, and training & development expenditure. Following the 1985 report 'Training in Britain', the Investors in People standard was developed during 1990 by the National Training Task Force in partnership with the Confederation of British Industry and The Trade Union Congress. It was managed by the Department for Education and Employment (now the Department for Education and Skills), and subsequently tested by regional Training and Enterprise Councils, and Local Enterprise Councils.

This initial version of the Investors in People Standard ('the Standard') claimed at least some 'academic' underpinning, with its principles based on research into 74 of the UK's leading companies. This led to the development of four principles of 'good practice' in the area of training and development, which became the basis of the original Standard. These principles were that good employers:

- show a commitment to develop all employees to achieve business goals;
- plan and review the training and development needs of all employees;
- take action to train and develop employees on recruitment and throughout their employment; and
- evaluate the investment in training and development to assess achievement and improve future investment.

In 1993, the volume of participating organisations led to the formation of an organisation, Investors in People, to take responsibility for delivery of the Standard, and its development. The organisation, Investors in People, is a non departmental public body (NDPB); reporting to, and receiving in excess of £5m annually from, the Department for Education and Skills.

The original standard

The original standard contained 23 Indicators that assessed an organisation's approaches towards training, and their subsequent compliance against aspects of what was identified as 'good practice'. An organisation meeting these minimum standards was, and still is, entitled to utilise the 'Investors in People' logo in its literature and stationery, and display a plaque.

The 23 indicators assessed quite specific features of training processes: for example, "A written plan identifies the organisation's training and development needs, and specifies what actions will be taken to meet those needs". This focus implied that, in the early years, the Investors in People Standard in effect provided organisations (particularly small) with a structured process towards training and developing staff: in other words, compliance with the standard at least demonstrated some degree of robustness in an organisation's approaches towards staff development.

The Standard was criticised for its burdensome administration and questions were continually raised, specifically from smaller businesses, with regard to the costs and benefits. This criticism was a particular driver for the revisions of the Standard that took place from 2000, as explored in the following section.

Chronology of the Standard

The following chronology shows how the Standard and Investors in People UK's approaches towards marketing and positioning it have diversified significantly over the last five years, raising questions both around the ongoing relevance of the Standard, and, indeed, whether the Standard represents a 'standard'.

The chart shows how, following high levels of consistency over the first decade, the five years from 2000 have resulted in a number of wholesale revisions and apparently unwarranted 'extension' of the initial Standard into areas unrelated to training.

Given the three years that organisations can take between accreditation periods, it is now possible for two current Investors in People organisations to have been legitimately assessed under different 'versions' of the Standard, calling into question the uniformity of approach and devaluing the nature of any accreditation.

Year	Significant event
1990	Original Investors in People Standard developed by the National Training Task Force with 23 indicators
1991	Investors in People UK organisation established to market the Standard
1992	No significant event noted.
1993	
1994	
1995	
1996	
1997	
1998	
1999	
2000	Revision of Standard from 23 to 12 indicators
2002	Additional £2.5m Government funding made available to Investors in People organisation to cover shortfall in take-up
	Separate Recruitment and Selection model launched
	Separate Work-life Balance model launched
2003	Separate Leadership and Management model developed
2004	Revision of revised Standard from 12 to 10 indicators
	Launch of Investors in People Corporate Solutions (joint venture with Penna plc, a resourcing and outplacement organisation)
2005	Launch of Profile tool, expanding Standard into four levels

Changes to the Standard

The level of change, both to the Indicators used in assessment for the Standard, and the offering provided by Investors in People, suggests two key themes:

1. Whilst it might seem reasonable to review a Standard over a ten or fifteen year time-frame, the pace of activity, with two wholesale changes to the Standard itself within four years, suggests some deeper underlying issue with the validity or usefulness of the construct.
2. The evolution of the offering has now moved significantly beyond the training and development arena. Review of the indicators (see Appendix I) shows that the original indicators simply assessed the presence of 'best practice' approaches towards training. As an example, "Objectives are set for training and development actions at the organisation, team and individual level".

The 2000 and 2004 indicators and assessment regime have moved away from this training process approach (see also Appendix I and later in this whitepaper) and into the broader arena of HR management.

We observe that the underlying theoretical and practical underpinning for such a change is not clear, and accordingly have concerns that the Standard is now described as providing "good practice" in broad areas of people management without any apparent evidence in support of its application in this area.

Given that Investors in People is marketed as a 'business development and business improvement tool', this lack of practical underpinning raises questions about the relevance of the Standard in this context.

Whilst we believe that accreditation in the Investors in People Standard may be better than no accreditation, for the purposes of introducing effective training or people management processes, at some stage it seems likely that diminishing returns result from its introduction.

As the Standard is not evaluative, but rather a process quality tool (which engenders a 'tick the box' mindset), it becomes difficult to ascribe value to its implementation.

Overview of research

We have provided a meta-review of key 'academic' and research articles (from 2002 to 2005) which have been reviewed to provide an independent verification of the impact of the Standard on organisations. These are summarised on the following pages.

Article	Summary findings
<p>1. Investors in People Impact Assessment 2004. Michaelis, C & McGuire M, Databuild Research & Solutions</p> <p>(This article has primary advertising on the IIP website).</p>	<ul style="list-style-type: none"> • ‘Claims’ that IIP organisations increased their profit by an additional £353 per employee per year relative to non-recognised organisations, though underlying method extremely questionable and misrepresentative • Investors in People organisations make many types of change more effectively than non-recognised companies
<p>2. How long until we get there? A survival analysis of the Investors in People initiative 1991-2001. Fernandez, R.M., Taylor, S. and Bell, E. SKOPE Research Paper No. 56 July 2005.</p>	<ul style="list-style-type: none"> • Private sector organisations are more likely to commit to the Standard but not obtain the Award • The Standard has become easier to attain between 1991 and 2001
<p>3. Investors in People: What’s it all about? Greener, S. and Bourner, T. Brighton Business School Working Paper, May 2005.</p>	<ul style="list-style-type: none"> • Report reviews IIP and is presented as a series of responses: these imply limited causality between IIP and organisational outcomes
<p>4. Understanding the new Investors in People standard – lessons from experience. Collins, L.A., Smith, J.A. Personnel Review, Vol. 33 No. 5, 2004 pp.583-604.</p>	<ul style="list-style-type: none"> • Conclusions raise questions about the validity of the IIP approach for small organisations
<p>5. Workplace training and the high skills vision: Where does Investors in People fit? Bell, E., Taylor, S. and Hoque, K. SKOPE Research Paper No. 45 Spring 2004.</p>	<ul style="list-style-type: none"> • Calls into question the impact of the Standard in enhancing skills within the UK workforce, its intended objective • £30m of financial incentives targeted at small businesses will devalue the Standard for large organisations
<p>6. Raising the Standard: the contribution of the Investors in People award to quality in the organisation. Tickle, W. and McLean, J. British Journal of Administrative Management, January/February 2004</p>	<ul style="list-style-type: none"> • Paper reviews IIP in the context of other business improvement models, asserting that it improves the results of quality programmes: no primary research in support of this appears to have been carried out
<p>7. “To change the way we do things is more important than the certificate on the wall”: does Investors in People represent an effective intervention strategy for organisational learning? Berry, C. and Grieves, J. The Learning Organization Vol.10 No.5 2003, 294-304.</p>	<ul style="list-style-type: none"> • IIP has only a limited linkage with business performance and has limitations as an organisational development intervention
<p>8. All in all, it’s just another plaque on the wall: the incidence and impact of the Investors in People standard. Hoque, K. Journal of Management Studies 40:2 March 2003, pp. 543-571</p>	<ul style="list-style-type: none"> • For a significant minority, IIP has had no long-term impact in creating a lasting change and is likely to be seen as a ‘badge’ • The report raises questions about the extent to which IIP accreditation in reality provides a guarantee of any attainment of a Standard
<p>9. The snakes and ladders of Investors in People. Research Report, Centre for Enterprise 2003.</p>	<ul style="list-style-type: none"> • The report questions the relevance of the Standard to small businesses
<p>10. A longitudinal study of business improvement models: cross purposes or congruity? Taylor, J. and McAdam, R. Managing Service Quality, 2003, 13; 5 p. 382</p>	<ul style="list-style-type: none"> • Staff attitudes towards Investors in People status declined from 1997 to 2002, suggesting either a degree of cynicism or organisational inability to meet raised expectations.
<p>11. Organizational differentiation through badging: Investors in People and the value of the sign. Bell, E. Taylor, S. and Thorpe, R. Journal of Management Studies 39:8 December 2002, pp 1071-1085</p>	<ul style="list-style-type: none"> • This study suggests that increased IIP recognition had devalued the badge for organisations of high reputation by 1998.
<p>12. A step in the right direction? Investors in People and the Learning Organization. Bell, E. Taylor, S. and Thorpe, R. British Journal of Management Vol. 13, 161-171 2002</p>	<ul style="list-style-type: none"> • The Standard is audit-based in nature, evaluating an organisation against set criteria rather than encouraging organisational learning

1. Investors in People Impact Assessment 2004. Michaelis, C & McGuire M, Databuild Research & Solutions

Report focus	Investigation into the impact on business performance of achieving accreditation for the Investors in People Standard
Methodology/sample	Perception-based assessment, no timeframe, unspecific in nature. 15 minute telephone structured interviews with 1,200 senior managers in IiP recognised organisations and a sample of 400 organisations that have not committed to IiP status. The composition was split between 400 public sector, 400 small/medium and 400 private sector organisation with more than 250 employees.
Key report findings/conclusions	<ul style="list-style-type: none"> • IiP organisations increased their profit by an additional £353 per employee per year relative to non-recognised organisations, although for organisations with more than 250 employees, this declines to £41 per employee per year • Investors in People organisations make many types of change more effectively than non-recognised companies • 94% of organisations see value in continuing to be recognised by IiP
Comment	<ul style="list-style-type: none"> • There is serious concern with the findings of this report in that the conclusions drawn are at best misleading and, at worst, totally unsubstantiated. Of significance, correlation with high performance attributes is completely unfounded and 'claimed findings' have no factual underpinning • Findings have been based on qualitative respondent comment only with no independent assessment of respondent perception or attributed econometric data • Issues exist around the sample and methodology that call into question the robustness of any findings, with concerns that the survey construct and timeframe used does not support any rigorous quantitative analysis • Only 400 of the 1,200 sample of recognised companies were private sector organisations with more than 250 employees, diluting the impact of any findings for large organisations • One third of the sample of recognised companies are public sector, for whom any financial benefits would be questionable • Claims that 94% of organisations see value in continuing to be recognised by IiP appears to be an inference, with no supporting evidence provided • The independence of the research can be questioned in light of its Investors in People funding • Given that this research is a prime advertisement on the Investors in People website, concerns should be raised over credibility and the potential 'misrepresentation' with regard to the claim of a business improvement tool

2. How long until we get there? A survival analysis of the Investors in People initiative 1991-2001. Fernandez, R.M., Taylor, S. and Bell, E. SKOPE Research Paper No. 56 July 2005.

Report focus	This academic paper reviews the historical take-up of Investors in People from Investor in People UK's database, finding that the Standard appears to have become easier to obtain from 1991-2001 and that public sector organisations are more likely to commit to the Standard and subsequently obtain it than private sector.
Methodology/sample	Analysis of the Investors in People database, reviewing all UK organisations committed to the Standard from January 1991 to the end of December 2001. Application of survival and hazard mathematical functions.
Key report findings/conclusions	<ul style="list-style-type: none"> • Once committed, the rate of recognition is higher for not-for-profit and public sector organisations • Investors in People accreditation has become easier to obtain over the ten year period (with potential implications for the value of the Standard as a marketing device or symbol) • Commitment to the Standard peaked in the mid-90s and has slowed down since
Comment	<ul style="list-style-type: none"> • This study shows that private sector organisations are more likely to commit to the Standard but not obtain the Award, suggesting either that the benefits of the Standard are less clear, or that the process of obtaining the Standard is seen as outweighing any potential benefits. • The increase in organisations obtaining the Standard identified implies either that the Standard has become easier (and thus less exclusive) to attain, or that any performance enhancement benefits gained through obtaining the Standard have reduced over time

3. Investors in People: What's it all about?

Greener, S. and Bournier, T. Brighton Business School Working Paper, May 2005.

Report focus	This working paper provides an overview of the Investors in People standard, process and approaches. It does not present primary research.
Methodology/sample	Question-and-answer focus.
Key report findings/conclusions	<ul style="list-style-type: none"> Main benefits of Investors in People relate to thinking strategically about people management, thinking about the development of all people in the organisation and clarifying connections between people development and organisational performance.
Comment	<ul style="list-style-type: none"> This review, through the benefits it asserts for Investors in People status, implies limited causality between Investors in People and organisational outcomes

4. Understanding the new Investors in People standard – lessons from experience. Collins, L.A., Smith, J.A. *Personnel Review*, Vol. 33 No. 5, 2004 pp.583-604.

Report focus	This academic paper reviews the experience of one small employer in implementing the Standard (2000 version), identifying a discrepancy between the promotion of the Standard as a flexible framework, and the experience of implementing it.
Methodology/sample	Case study of a small organisation (46 employees) implementing the Standard
Key report findings/conclusions	<ul style="list-style-type: none"> Despite the Standard being promoted as an easy and flexible framework, the organisation's experience of implementation did not provide it with the opportunity to interpret the Standard in a way that was appropriate for its needs This disparity between the promotion of the Standard and the reality start to question whether the fundamental goal of IiP is appropriate Revisions to the Standard have increased the weighting placed on verbal evidence gained through interviews, even though this causes issues Documentation provided by Investors in People (e.g. for the survey) used language that was unfamiliar to the organisation's employees, suggesting that a questionnaire is of limited value in data gathering Despite changes in approaches to gathering evidence, the new standard (2001 version) required more support from the IiP Adviser than was provided
Comment	<ul style="list-style-type: none"> Whilst the authors acknowledge the difficulties in drawing broad conclusions from a single case study, their conclusions raise questions about the validity of the IiP approach for small organisations Questions are raised around the role of the external IiP Adviser, organisational expectations around their readiness, and both the rigour and flexibility of components of the assessment process

5. Workplace training and the high skills vision: Where does Investors in People fit? Bell, E., Taylor, S. and Hoque, K. SKOPE Research Paper No. 45 Spring 2004.

Report focus	This academic study reviews from a policy perspective the impact of Investors in People in enhancing skills in the UK workforce – its stated objective. The paper questions the extent to which Investors in People has resulted in enhanced skills within organisations.
Methodology/sample	Literature and policy review.
Key report findings/conclusions	<ul style="list-style-type: none"> • Two broad conclusions are reached: issues exists in the takeup of the Standard by small organisations who are most likely to benefit from its introduction; and many accredited workplaces do not appear to maintain the training approaches and commitment intended by the Standard • Analysis of the 1998 Workplace Employee Relations Survey identifies that public sector workplaces are more likely to have secured accreditation than private sector workplaces • The decision to seek IiP status is likely to relate in internal organisational politics rather than perceived impact on training and development activity • The three-year reaccreditation period provides scope for business to revert to their previous practices – evidence exists that training in accredited workplaces falls below levels intended by the Standard •
Comment	<ul style="list-style-type: none"> • This article calls into question the impact of the Standard in enhancing skills within the UK workforce, its intended objective, • The article finds the export of the IiP standard to Australia, France, Germany, Netherlands, South Africa) as running counter to this objective. • The article additionally highlights the potential that £30m of financial incentives targeted at small businesses will devalue the Standard for large organisations, implying an erosion of any 'recognition' factor in accreditation

6. Raising the Standard: the contribution of the Investors in People award to quality in the organisation. Tickle, W. and McLean, J. *British Journal of Administrative Management*, January/February 2004

Report focus	This article asserts that Investors in People supports the achievement of other quality standards. It does not present primary research or substantial references in support of claims made.
Methodology/sample	Not applicable given nature of article.
Key report findings/conclusions	<ul style="list-style-type: none"> • IiP contributes to quality in the organisation, providing organisations with key benchmarks and performance criteria against which they can develop employees to achieve key business objectives that lead to continuous improvements in bottom line performance and customer satisfaction. • IiP improves the quality as well as quantity of output, by treating employees as an investment
Comment	<ul style="list-style-type: none"> • No supporting evidence or primary research offered to back up assertions made, with limited use of references • Primary author is a registered Investors in People Practitioner and has worked as an Investors in People Advisor, raising questions around the objectivity of the comments made

7. "To change the way we do things is more important than the certificate on the wall": does Investors in People represent an effective intervention strategy for organisational learning? Berry, C. and Grievess, J. *The Learning Organization* Vol.10 No.5 2003, 294-304.

Report focus	Through review of local authorities with Investors in People status, this academic paper argues that take-up in this sector has been driven by policy decisions, rather than any expectation that the Standard will act as a performance enhancing tool or organisational development intervention.
Methodology/sample	Survey to 120 UK local authorities with IiP accreditation (with 53% response rate); semi-structured interviews within one case study organisation; exploratory telephone interviews with NE regional IiP officers and ex-assessors
Key report findings/conclusions	<ul style="list-style-type: none"> • Primary reasons for introducing IiP were corporate policy and as a badge of recognition, not as a means of solving a specific organisational problem • Only 28% of respondents stated that any performance improvement was obtained through the Standard • Previous studies cast doubt on the effectiveness of IiP to increase UK business performance • Reports indicate staff collusion in putting forward a favourable view of the organisation
Comment	<ul style="list-style-type: none"> • This study, within a local government context, suggests that IiP has only a limited linkage with business performance and has limitations as an organisational development intervention

8. All in all, it's just another plaque on the wall: the incidence and impact of the Investors in People standard. Hoque, K. *Journal of Management Studies* 40:2 March 2003, pp. 543-571

Report focus	Through a review of independently-collated data, the author finds evidence that is at best inconclusive of any beneficial impact of Investors in People status on training practice, and at worst suggests that, in a significant proportion of organisations, practices deteriorate after accreditation.
Methodology/sample	Analysis of the 1998 Workplace Employee Relations Survey (1,727 workplaces) through survey probit or ordered probit modelling techniques. 38% of the sample was IiP accredited.
Key report findings/conclusions	<ul style="list-style-type: none"> • On average, training practice is better in IiP-accredited organisations, but it remains open to question whether this results from changes made as a result of accreditation, or whether accredited workplaces were engaging in good practice anyway • A considerable minority of accredited workplaces are not engaging in training activity, suggesting inconsistent quality of assessment, or that practice deteriorates once accreditation has been achieved
Comment	<ul style="list-style-type: none"> • This study suggests that, for a significant minority, IiP has had no long-term impact in creating a lasting change and is likely to be seen as a 'badge' • The report raises questions about the extent to which IiP accreditation in reality provides a guarantee of any attainment of a Standard, or whether organisations implement it simply for recognition purposes

9. The snakes and ladders of Investors in People. Research Report, Centre for Enterprise 2003.

Report focus	The Snakes and Ladders project was conducted by the Centre for Enterprise for Investors in People, with support from the Learning and Skills Council and Education and Learning Wales. The report aimed to identify why small businesses engage (or otherwise) with Investors in People, and is essentially an input to policy-making. In its conclusions, it raises a fundamental question around whether the current approach to ensuring high levels of take-up of Investors in People is counter to its stated aim of supporting the adoption of best practice approaches.
Methodology/sample	The approach was qualitative and covered: literature review, 54 interviews with accredited small businesses, 38 interviews with non-accredited small businesses, 17 interviews with advisers working on the Standard with small businesses, a policy workshop, and 9 focus groups. Fieldwork was conducted in Wales, the East Midlands and Kent.
Key report findings/conclusions	<ul style="list-style-type: none"> • Three key questions are raised: is the Standard related to business improvement or training? Is the Standard about reworking the business or a toolkit for particular problems? Is the Standard about getting as many businesses badged as possible, or recognizing the best? • The report expresses some concern that the IiP Standard might not be changing business behaviour as much as certifying existing good practice, calling into question the impact of public funding • Qualitative assessment identifies that achievement of the Standard is not seen as associated with business issues or providing an organisational challenge • Takeup amongst small businesses appears to correlate with funding availability
Comment	<ul style="list-style-type: none"> • In its conclusions, the report questions the relevance of the Standard and its implementation to small businesses • The report advocates that, counter to current intent, the Standard should be developed as a badge of exclusivity. • Qualitative methodology provides a wide range of quotations to illustrate points, but provides an inconclusive basis for policy formation • Research scope limited to three geographic regions and unclear how generally applicable the findings are • Despite these limitations, the questions raised in analysis relating to the nature of the Standard illustrate a lack of clarity around the rationale for the Standard amongst small businesses and potentially advisers

10. A longitudinal study of business improvement models: cross purposes or congruity? Taylor, J. and McAdam, R. *Managing Service Quality*, 2003, 13; 5 p. 382

Report focus	This study identifies that staff attitudes towards Investors in People status had declined from 1997 to 2002, suggesting either a degree of cynicism or organisational inability to meet raised expectations.
Methodology/sample	Exploratory case studies, with the first analysis conducted in 1997 and follow-up analysis in 2002. The review was conducted on three hotels in Ireland.
Key report findings/conclusions	<ul style="list-style-type: none"> Organisations attributing enhanced performance to IiP make no direct link between IiP and an improved bottom line Benefits from IiP are perceptual or 'feel good' Staff perception of the individual benefits of Investors in People declined between 1997 and 2002
Comment	<ul style="list-style-type: none"> Questionable application of findings given limited sample size within a particular sector and geographic coverage Findings suggest an increased cynicism around the Standard and potential issues in meeting raised staff expectations

11. Organizational differentiation through badging: Investors in People and the value of the sign. Bell, E. Taylor, S. and Thorpe, R. *Journal of Management Studies* 39:8 December 2002, pp 1071-1085

Report focus	This academic study explores how 'getting the badge' as opposed to seeking to enhance training approaches drives organisational involvement in IiP. It concludes that, as more organisations become accredited, the value of the badge reduces.
Methodology/sample	77 qualitative, interviews conducted in six accredited organisations of different size (60-2000 employees) between 1995 and 1998.
Key report findings/conclusions	<ul style="list-style-type: none"> This study identifies the primary object of recognition as 'getting the badge' as opposed to seeking to introduce process enhancements. The authors identify concerns expressed in the 1990s about the reduced differentiation that the badge provided as more and smaller organisations became accredited. "It's a quality standard, and if everybody has it, then you're back to the same as nobody having it" (p. 1079). The study concludes by stating that "as a greater number of organizations get the IiP badge, it becomes less exclusively desirable." (p. 1082)
Comment	<ul style="list-style-type: none"> This study suggests that increased IiP recognition had devalued the badge for organisations of high reputation by 1998. Were this to hold true amongst all larger UK organisations, this would conflict with the Investors in People organisation's aim of covering 45% of the UK's workforce by December 2007.

12. A step in the right direction? Investors in People and the Learning Organization. Bell, E. Taylor, S. and Thorpe, R. *British Journal of Management* Vol. 13, 161-171 2002

Report focus	This academic study explores how the processes that form part of the Investors in People standard can run counter to organisational learning, focusing training solely on business requirements as opposed to any broader individual development.
Methodology/sample	77 semi-structured, interviews with senior managers, middle managers and employees in six accredited organisations of different size (60-2000 employees) in 1997 and 1998
Key report findings/conclusions	<ul style="list-style-type: none"> • The policies and practices associated with the Standard run counter to learning within the organisation • Senior managers identified the Standard as having public relations or funding benefits; middle managers initially identified the processes as valuable, but in the phase before assessment, regarded the exercise as 'jumping through hoops' • Respondents questioned the value of the Standard if anyone could get it
Comment	<ul style="list-style-type: none"> • This study suggests that, despite its stated aims of encouraging enhanced training & development approaches, the Standard is audit-based in nature, evaluating an organisation against set criteria rather than encouraging organisational learning

Other research related papers

In addition to the recent articles and research papers reviewed above, a number of earlier articles and papers were identified. In light of their publication date, detailed review was not performed (particularly given the changes to the Standard from 2000), but summary overviews are identified in Appendix II. Their findings support those made above for the more recent research.

IIP website claims

The Investors in People UK website summarises seven benefits of achieving the Standard. These are set out in the table below with a short commentary added.

Stated benefit	Commentary
<ul style="list-style-type: none"> • Improved earnings, productivity and profitability 	Limited relevance to public sector organisations; for the private sector, it is unclear how this is attributed to the Standard
<ul style="list-style-type: none"> • Customer satisfaction 	Limited historic relevance to public sector organisations; for the private sector, it is unclear how this is attributed to the Standard
<ul style="list-style-type: none"> • Improved motivation 	Measurement construct unclear
<ul style="list-style-type: none"> • Reduced costs and wastage 	Unclear how this is to be attributed to the Standard
<ul style="list-style-type: none"> • Enhanced quality 	Unclear how this is to be attributed to the Standard
<ul style="list-style-type: none"> • Competitive advantage through improved performance 	Suspect if 37,000 organisations possess accreditation; duplication with initial stated benefit
<ul style="list-style-type: none"> • Public recognition 	Subjective benefit at best

Investor in People case studies

The Investors in People website contains 148 short case studies on the achievements of accredited organisations, and how they view the introduction or maintenance of Investors in People. Within each case study, certain results are claimed from the introduction of Investors in People (although formats are inconsistent across the case studies).

All case studies have been reviewed (see following) to provide concise commentary on the claims made for the introduction of Investors in People within organisations¹⁷. This review shows that certain, consistent themes emerge.

- **The majority of claimed benefits are qualitative and anecdotal in nature (i.e. not measured) and reliant on individual perception with little evidence or grounding**
- **Quantified claims have little evident attribution to Investors in People standard (e.g. those relating to business growth)**
- **There is a degree of confusion within certain case studies between apparent benefits attributed to Investors in People, and those brought about through the introduction of parallel change initiatives or standards**
- **Where a number of (typically smaller) organisations have claimed benefit, these often relate to the introduction of 'baseline' processes**
- **Many organisations use the case studies to outline internal measures implemented, with limited linkage to organisational outcomes**
- **There is limited evidence of editing or validation of claims made.**

In light of these findings, and despite the number of case studies available, we would advise that a reader should maintain a high degree of interpretative caution and should differentiate between internal initiatives introduced or supported; and measurable, organisational benefits arising from the introduction of Investors in People.

¹⁷ In light of multiple case study formats, some limited editing has been necessary to ensure that the results identified within the case studies overleaf are representative of the web-site declarations.



Organisation	Size	Stated result	Commentary
Action Mental Health	130	<p>In short, Investors in People has fostered a significant culture change. Bernadette Best adds: "Gaining the standard was part of our corporate plan. Working towards Investors in People helped us to link our corporate objectives and operational plans with our expectations of each individual member of our team. Our new system of work planning means that individuals at every level have a clear understanding of their role and of their vital contribution to the business."</p> <p>Part of this drive was to involve employees more closely in the charity's performance appraisal system. This is now more appraisee-led and individuals are encouraged to shape their own work plans. The effect on motivation has been significant. Indeed, it is in the area of evaluation that Investors in People has had a particularly dramatic effect. The Investors in People process helped the charity to identify this vital missing link and set up systems to fill the gap: "Our evaluation was pretty weak before we committed to the standard. For the first time this year we have carried out a detailed cost benefit analysis. We now know the impact on job performance of every course we've delivered – something that has been a valuable tool in helping us to spend our budget better. It's also the sort of information that we need to provide in funding bids. It's an example of how Investors in People focused our attention on something of a missing link in our processes."</p> <p>There were other spin-offs too. The charity's IT system was in need of modernisation and Investors In People helped in establishing a training programme that would dovetail with the corporate strategy.</p>	Benefits are described in qualitative terms only, relating to individual perspective of the impact of establishing 'baseline' processes.
Adult Learning Inspectorate	250	<p>One of the most important outcomes for the ALI has been gaining recognition of the Standard as a means of driving business improvement. "It's a cross-functional exercise that involves people at all levels of the organisation – it's not top-down," Ann adds. "We recognise that a great many changes can come from the bottom up. In fact people have felt able to discuss suggestions for improvements with the Internal Review team that might not otherwise have been raised." "And it's a development opportunity for staff who can go out and find out what is going on in the organisation."</p> <p>Internal Review was also the cost effective option. "As a public body we have a duty to ensure we get best value for money and that we are delivering efficiencies – so it was an important factor for us."</p> <p>"But the driving force was personnel development," concludes Ann, "and the business benefits are obvious. As a service company, the better your people understand the business - the better your business is. And having Internal Review and Investors in People will keep driving that forward for us."</p>	<p>Comments reveal 'personnel development' as a driver (highlighting the roots of Investors in People).</p> <p>Benefits are described in qualitative terms only.</p>
Alderbrook School	116	<p>We issued the questionnaire again in April 2002 which resulted in a super turn-around! Staff feel more part of the team, they are clearer about where we are heading and morale has been raised. Examples of the responses were:</p> <p>'Are school policies / routines clearly explained to you?' 2001 = 49% 2002 = 96%</p> <p>'School improvement plan - your ideas are welcomed?' 2001 = 66% 2002 = 82%</p> <p>'Do you understand how you can contribute to the improvement plan?' 2001 = 48% 2002 = 73%</p> <p>'You have the opportunity to fully use your skills and interests' 2001 = 56% 2002 = 93%</p> <ul style="list-style-type: none"> • CPD targets are better focussed in the context of both the staff's own careers and the school's improvement plan • The process helped with the introduction of performance management • We had an outstanding OFSTED report in March 2003. The inspectors accepted all our CPD strategies and plans without further question • 10 of our cleaners have now successfully completed an NVQ • We are getting applications from better quality new staff and those who are moving away are going on to promotions. • Our last GCSE results were our best ever! 	<p>Benefits as measured by survey responses relate to aspects of internal communication.</p> <p>Other stated benefits either are qualitative, or are not causally linked to IIP, as opposed to other efforts at involvement (e.g. the introduction of the survey).</p>



Organisation	Size	Stated result	Commentary
Aldercar Infant School	31	<p>Hearing Impaired children are fully integrated into mainstream schooling with 100% support. They are equal to any other child. All teachers, support staff and volunteers sign and many parents have been taught some basic signing so that children can visit their homes. Everything that happens in school is automatically signed for all children. Prejudice has been overcome from organisations for the Hearing Impaired who were not convinced that mainstreaming was best and from some parents of other children who were worried that their children would be held back.</p> <p>Investors in People brought everything together so that:</p> <ul style="list-style-type: none"> the organisation is good made working with staff more purposeful and organised helped the team itself work better and there is improved morale helped in overall successes in school (both at a personal and school level) for example: Achieved Beacon School status in 2002 and was one of the winners of the National Training Awards in 1998 school staff are contributing to the school featured on the TV programme See Hear as demonstrating the ideal way for Hearing Impaired children to be taught the volunteers who achieve qualifications go on to paid employment elsewhere the Head is a facilitator of the Investors in Excellence initiative. Ofsted on both occasions, 1996 and 2000 considered Investors in People a 'plus'. Assumptions were made that certain areas would be covered well because of Investors in People and were not looked at again in detail. 	Benefits are qualitative only. Causal linkage to the IiP is complicated through an apparently broader approach towards 'change management' within the School.
Allevarad Springs	74	<p>Since the company first gained Investors in People in 1998, year on year output has improved significantly:</p> <p>1998 3,508,000 springs 1999 3,666,3000 springs 2000 4,051,000 springs</p> <p>The training was fine-tuned while Allevarad worked towards Investors in People recognition and this has had a direct benefit on the overall efficiency of the plant. Output has increased as staff have become more knowledgeable about the products they make and about the manufacturing process as a whole, especially in the field of IT.</p>	Unclear how increase in production is linked to IiP status.
Alun School	160	<ul style="list-style-type: none"> Parental surveys have shown a steady increase in satisfaction, with the quality of service provided by the School, year on year. 'A' level Performance Indicators for the Alun School are consistently equal to, or higher than, those for the Local Education Authority area and Wales as a whole. In 2004 the percentage of pupils achieving 5 or more GCSE grades A-C was 66% compared with a national average of 51%. Support staff now take more responsibility for dealing with issues relating to their work areas, resulting in more efficient operation of the School and increased motivation of staff 	Unclear how pupil outcomes are linked to IiP status; other stated benefits appear to be qualitative descriptions relating to the introduction of baseline processes.
Anglesey Sea Zoo	20	<p>Anglesey Sea Zoo has won a number of awards for the quality of its service and the development of its business and staff, these include:</p> <ul style="list-style-type: none"> VAQAS (Visitor Attraction Quality Assurance Service) Gold Medal for Services to Tourism Investors in People UK 'Top Training Tip' awarded, resulting in a free attendance at a 3-day Cranfield Business School course. A National Tourism Training award, resulting in a £5,000 cash prize. 	Unclear how these outcomes relate to IiP status.



Organisation	Size	Stated result	Commentary
Archant Devon	120	<p>Annual turnover was increased by £3 million, aided by acquisition. There was an eightfold increase in profits, including the turnaround from loss to profit contribution of acquisitions, and increase in percentage profitability on sales. High standards of working practices are established in all departments. Through effective staff training, there have been increases in business performance of:</p> <ul style="list-style-type: none"> • credit control (reduced by two-thirds) • profitability • ability to launch and acquire new businesses. <p>The business results were gratifying, and so too were the advantages for people. In recent audits, staff have revealed that they see the company as being 'caring', with managers now listening to them. The more positive attitude to working which the employees have is largely attributable to their increased knowledge of the aims and achievements of the business. The appraisal system and the increased allocation of resources to training mean that staff have easier access to high-quality training. All staff are now involved in some form of training relevant to their function and level.</p>	<p>Unclear how turnover and profitability claims are related to IiP status (particularly given acquisitions).</p> <p>Other benefits are predominantly qualitative and relate to 'baseline' process integration/communication.</p>
Ashwell Pupil Referral Unit	27	<p>Investors in People has made a significant contribution towards the following:</p> <ul style="list-style-type: none"> • It underpins the ethos of Ashwell • A sense of us all working towards a common goal, therefore improved teamwork • All staff have and have had the appropriate training to match the needs of the Unit. This is on-going with a focus on prevention and using de-escalation as the tool for managing situations and keeping both pupils and staff safe • Performance Management is seen by the staff as an opportunity to improve their aim and the Unit's performance • The promotion of praise and support as an integral part of the Unit's culture • Low staff turnover and the ability to attract quality staff. With children with such complex needs staff have to be looked after carefully • The Unit's ability to raise the self esteem of pupils and increase their achievements 	<p>Benefits are qualitative in nature and relate to the establishment of 'baseline' processes.</p>
Badgers Café	38	<ul style="list-style-type: none"> • The business has doubled its profitability within the last 2 years. • Badgers Café has been recognised by Taste of Wales and the Wales Tourist Board, who award the business a Quality Crown for superior customer service. • The café was voted 'Best Newcomer in 2000' by the Les Routieres guide. • Badgers also received the 'Best Tearoom in Wales' accolade and is rated amongst the 'Top 10 Tearooms in the UK' by the tea Council. • Donna Horton won the 'Tourist Manager of the Year' award in a competition run by the Wales Tourist Board. • In 2003 the cafe became the Tourism Forum For Wales Overall Exemplar Business highlighting the best practices in Human Resource and Development • In 2004 won the National Merit Award for British Small Business Champions. 	<p>Unclear how benefits relate to IiP status.</p>
Badham Pharmacy	100	<p>Since achieving Investors in People recognition in 1999 Badham Pharmacy has seen a significant increase in turnover. The company has also benefited from significant improvements in staff relations. As Jean Badham, Managing Director, said: "We now have closer contact with our staff and are committed to being more involved with their development and well-being. This means that all our employees, both retail and ethical, now take a greater interest in the business – and are more motivated and satisfied in their work. "</p> <p>"As our staff are happier, they not only provide a better service to our customers, but also are better able to present the company's image to customers which ultimately enhances our organisation's reputation."</p>	<p>Unclear how turnover increase is to be attributed to IiP status.</p> <p>Other benefits are qualitative in nature and relate to an individual perspective.</p>

Organisation	Size	Stated result	Commentary
Barclays Business Banking	600	<p>The results speak for themselves. In two years, the site has seen significant improvements in morale with far lower rates of absenteeism than before. "Gadbrook Park has become a very relaxed place to work, which is a significant achievement in a call centre environment. Our levels of sickness are almost negligible and, of the few people who do leave, there are always positive reasons for doing so rather than because they don't like it here.</p> <p>"Perhaps the greatest indicator of our success is the fact that we've just won the European Call Centre of the Year award. That's a tribute to everybody who works here and their commitment to the company, which to me is the best indicator that we're getting it right."</p>	Unclear how outcomes are to be attributed to IIP status (particularly as case study identifies IIP as being a means of "external validation" of changes made).
Barnfield College	1,000	<p>Barnfield was the first general further education college to be awarded Learning & Skills Beacon status. Under this scheme, it is funded to disseminate its best practice and mentor and support less successful institutions. It is currently working as a Beacon with seven colleges. The college is a Centre of Vocational Excellence (CoVE) in Motor Vehicle Engineering, Construction, Computing and Business, and CoVE recognition in Healthcare is expected to be added soon. This is in line with its mission to offer education in what it describes as the "Yellow Pages" occupations. With its reputation for staff development, the college "grows it own" and is an "exporter of talent". Support staff have progressed, students have taken academic and professional qualifications and have qualified as teachers to work at the college and elsewhere. The college intranet is used as a valuable tool for communications and learning. Every member of staff benefits from pay awards which are well above the rate of inflation. The entire staff get together off-site for one day each year, and 35% of the full time staff have some form of off-site residential development each year. For students, retention and pass rates are well above national averages. In the most recent joint inspection by OfSTED and the Adult Learning Inspectorate in 2003, the college was graded as "Outstanding" for quality of teaching, learning and student achievement in many curriculum areas. The college's leadership and management was also rated as "Outstanding" along with its performance on inclusion and community links.</p>	Unclear how benefits are attributable to IIP status, particularly as the case study additionally references EFQM and 'management by walking around' as approaches used.
Bathampton Primary School	19	<ul style="list-style-type: none"> • Whole school focus • Clear strategies for planning for improvement • Smartening up of all staff meetings, Governors' meetings, working parties, cross school meetings, etc • Proof through weighing up Costs/Benefits. 	Qualitative benefits relating to the introduction of 'baseline' processes.
BBC	26,000	<p>"Our annual staff survey showed incremental improvements year on year," explains Mark. "It is designed against a model for organisation health and performance improvement and gives us a good picture at a number of different levels in the organisation. "Since achieving the Investors in People Standard we are much more consistent in people management and development," adds Mark, who has since become an Ambassador for Investors in People. "Line managers are more aware of day-to-day responsibilities and the need for regular conversations with staff over and above formal annual appraisal. "For example, despite a background of considerable change across the BBC over the past 18 months, management practice has improved by 1% in the last year. "Our regular two-way communication has improved and we now have much more creative ways of engaging staff in upward communication. "Investors in People has provided a platform for continuous improvement across the BBC," concludes Mark, "and an important method for evaluating our progress with our major change programme."</p>	<p>Where data is cited, it is insufficient to establish a trend.</p> <p>Unclear how quantified impact can be attributed to IIP: other stated benefits are qualitative in nature.</p>



Organisation	Size	Stated result	Commentary
Beachcroft Wansboroughs	1,250	Working with the Investors in People Standard has enabled the firm to set clear aims and objectives tied to its business goals, and to evaluate and measure results clearly. Investors in People has certainly moved skills and training up the agenda within the firm. Many businesses see people development as 'a nice to have' rather than a core business function – but it isn't, it is hard work, and it has to produce the goods and have a direct impact on business performance,' says senior partner, Lord Hunt. He concludes: "The Investors in People Standard means we can ensure that we achieve our business objectives through our people in an equitable and commercially focused way."	Benefits unquantified; qualitative assessment only.
Bishopsford Community School	65	Everyone was astounded and pleased that the School was successful. The people most intimately involved felt a personal sense of achievement .There has not yet been time to quantify benefits for pupils. Having the Investors in People Standard has helped with recruitment; newly qualified teachers are attracted by Investors in People. The School has become a learning community, confident in its abilities to support and develop staff. Having the Investors in People Standard helps with OFSTED because it becomes part of the formal recognition of the School. 'Investors is the cherry on the top of the cake'.	Qualitative benefits relating to the introduction of 'baseline' processes.
Bluestone Construction	50	"We now have a happier and better informed group of people working for us. Yes, we spend more on training, but it is essential that we have a skilled workforce. This industry has always suffered from a poor image and always will, unless people do something to improve it. This was now our chance to do just that." The Bluestone office in Banbury can now boast 90% repeat business, with over 75% of the work negotiated. The introduction of an appraisal system and personal and workforce development plans for all means that Bluestone has people that are not only competent but also confident to deal with all their client's needs and expectations.	Where quantified, unclear how outcomes are attributable to IiP. Other benefits are qualitative in nature.
BMW (South Africa)	3,000	Robertson believes that the feedback received from Investors in People has been valuable in that it has given the company a more holistic feel. "n a country where education is probably the most critical element for improving the livelihood of people, having a structure and process and a strong network of people who can help others is extremely important," says Robertson. "The way we work with leadership, and the way we promote training and development is critical to our success in the future. We are pleased to be there but, more importantly, we are looking forward to helping others to adopt the Standard."	Benefits are qualitative in nature.
Bodelwyddan Castle Hotel	154	Investors in People has helped to recognise the potential within the hotel. Staff are developed to be multi-skilled and flexible, and several have been supported to progress to supervisory and management positions. The hotel has an enviable 93% occupancy rate across the year, profit targets grew by 8% in 2003, staff retention has increased and applicants for vacancies outnumber the posts available. Potential staff now apply on the recommendation of their friends and families. All staff have a keen eye for controlling costs and, for example, energy bills have been significantly reduced. Successes are celebrated, morale is excellent and Investors in People is now "part of the great culture at the hotel". It has won the Group's "Best All-Inclusive Destination" Award and three national tourism awards. Its rate of complaints is continuously falling - it's the lowest in the group - and the number of compliments from delighted customers continues to rise.	Where quantified, unclear how outcomes are attributable to IiP.
Brecon Beacons Natural Water	22	'now we are consistently making a profit' (Plant Manager, Jim Bradbury). Efficiency improved by 30 per cent. "staff now have proper objectives and regular appraisals the organisation is now better equipped to cope with change."	Where quantified, unclear how outcomes are attributable to IiP.



Organisation	Size	Stated result	Commentary
Bridgestone UK	155	<p>With the implementation of kaizen we saw, year-on-year, an improvement in the five areas previously tackled. These were then moved out of being named and shamed the following year," explains Paul.</p> <p>For example the team dealing with the treatment of staff developed a high quality 'temporary worker' assignment pack and also instigated the use of exit interviews, all of which helped improve team stability.</p> <p>The introduction of processes such as the employee survey and subsequent group taskforces have also had knock on effects. The way the teams work together has seen them generate their own ideas for improvement.</p> <p>"The reviews brought about a general improvement to the induction process – including an induction reference manual which explains all the different teams, their roles, missions, objectives, how they fit in with other teams, maps, diagrams and so on," says Paul. "As it is continuously updated the document has proved useful beyond induction as staff can reference it to spot potential opportunities for business or self improvement too."</p> <p>The results have been reflected in the staff surveys, which have witnessed a year-on-year improvement across the board for the past five years.</p> <p>They show an impressive fall in staff turnover from just over 60 per cent five years ago to just under 12 per cent now. Alongside a better standard of training and development, this is attributed to the fact that people can see they are being listened to.</p> <p>"Our customers have also noticed a distinct improvement," adds Paul. "We don't get complaints now! We survey our customers and let them see the KPIs relevant to them, so they also have a say.</p>	Unclear how IiP relates to stated benefits ('kaizen' is referenced as the source).
BUPA Care Services	24,000	<p>"We track a number of Key Performance Indicators (KPIs) which cover a variety of business aspects such as people, finance, quality and the customer," says Bryan. "We regularly measure these and have witnessed a positive impact as a result of the changes made under the Standard. Job satisfaction for instance has steadily increased and this is as a direct result of the systems and processes we have implemented in line with Investors in People."</p> <p>Since embarking on the path towards Investors in People accreditation BUPA has also witnessed a remarkable reduction in staff turnover. "We have seen a drop of approximately 10 per cent," explains Bryan. "Again the framework provided by Investors in People has been instrumental in this. The result has meant both cost savings to the business as well as improvements in quality, as consistency of staff has helped us deliver a more reliable level of service to our customers."</p> <p>Bryan also recognises the benefit that having Investors in People has on external perceptions of the organisation. "For our local authority customers, achieving the Standard is an independent confirmation of our quality status and the value they receive as a result is enhanced."</p>	<p>Unclear how impact was attributed to IiP given the introduction of a development initiative in parallel.</p> <p>Where quantified, unclear how benefits are attributable to IiP status.</p>
BUPA Health Care Partnerships	250	<p>"The Profile report was very comprehensive and in-depth," says Bob. "We were expecting it to be quite tough in some areas, but in fact we did better than we imagined."</p> <p>Overall the organisation scored higher than level 1 in all indicators, and reached level 4 in a total of five areas. And, according to Bob, the report gave them practical advice on where progress could be made. "It gave us a clear idea about what we were doing right and at the same time showed us where we need to focus our efforts.</p>	Unclear how IiP, as opposed to any external review, has resulted in specific benefits.
Buro Happold	920	Investors in People has provided the flexibility needed to safeguard innovation while preserving a robust organisational structure. This has enabled Buro Happold to retain local competencies and techniques, while providing a consistent culture across global offices.	Benefits are qualitative, with limited specificity.



Organisation	Size	Stated result	Commentary
CR Knight Joinery	18	<p>Since setting out to achieve the Investor in People Standard, C.R.Knight has seen some major improvements to the overall cost effectiveness of the company. "Whilst we have always portrayed a professional image there is much more focus on roles and responsibilities of individuals appropriate to their skills and experience," says Clive.</p> <p>"The implementation of basic controls, procedures and policies, including the introduction of a comprehensive induction and regular staff review process, has resulted in people feeling more involved with their own individual productivity and quality of work. As a consequence, not only are the people more motivated, they are totally involved with the success of the company."</p> <p>Clive has also found he is able to focus his efforts on the bigger picture: "Establishing these controls and disciplines has given me more time to attend to the strategy and future growth of the business," he said. "Prior to working towards the Investor in People Standard I felt I had to be involved with every aspect of the business. Now we've instituted a basic but meaningful staff training and development plan and I can rely on my line management to make decisions confident that their judgement will be correct and will be of benefit to the business."</p>	<p>Unclear how financial benefits relate to IiP introduction.</p> <p>Qualitative benefits relate to the introduction of 'baseline' processes.</p>
Catherine Johnstone Recruitment	177	<p>"You can measure and assess your success with Investors in People in a number of ways" muses Davies. "I can point to the fact that in 1995 we were a company with 12 people and a £1.5 million turnover and that now we have 17 people and a £5 million turnover, which is an enormous increase in productivity.</p> <p>"In 2003 we won an 'Employer of the Year' Award and were a finalist in the 'National Business Awards' in the training and development category and we could only do that with the lessons we have learned from Investors in People.</p> <p>"I've got the facts and figures to demonstrate we're more successful but I don't need them to know that I have a happy, motivated and productive workforce; I see it every day."</p>	<p>Unclear how benefits are attributable to IiP introduction.</p>
Chelmsford College	450	<p>The College is proud to have been recognised as an Investors in People Champion. In pursuit of its mission and values it is open to share best practice and to continue to learn from others. It has expertise in business planning, planning and evaluation of learning and development, and work-life balance. It will offer its experience as a mentor and is open to suggestions for other means of dissemination.</p>	<p>Benefits are qualitative, with limited specificity.</p>
Churches Regional Commission for Yorkshire and the Humber	54	<p>Graham Brownlee strongly believes that motivation and internal communication has improved as a direct result of achieving the Standard, "It has really helped us open up our meetings. We are also much better at delivering what we set out to do now.</p>	<p>Benefits are qualitative only.</p>



Organisation	Size	Stated result	Commentary
Clarkson Evans	240	Clarkson Evans first achieved Investors in People in 1999. Since then turnover has increased by £9 million and the number of staff has trebled. "The growth of the business over the last few years has been exceptional," said training director, Gerald Crittle. "Using Investors in People principles we have been able to develop the skilled workforce needed to support increasing customer demand." However, it's not just tangible results that Clarkson Evans has benefited from since achieving Investors in People, as Gerald Crittle continues: "Our staff have been encouraged to not only develop their own skills and knowledge but also that of others within their team. This applies equally to electricians working on site, and to someone in the technical, accounts or training teams. All directors have been promoted from within, which couldn't have happened without our training programmes." The company's achievement of many national awards can also be partly attributed to Investors in People; procedures put in place for the Investors in People accreditation have aided the success that has time and again impressed judging panels made up of some of the most successful and influential leaders in the education sector. And the company now has greater credibility, as Gerald Crittle said: "Investors in People sends a very positive message to our staff and customers – both prospective and current. It's a valuable selling tool, especially as not many contractors who work on housing developments have Investors in People accreditation."	Unclear how benefits are attributable to IiP introduction. Benefits are qualitative in nature.
ClinPhone Group	293	The people systems put in place have matured. Recruitment and selection processes are rigorous and effective. Every member of staff has role-specific induction and a personal professional development portfolio. Regular appraisals and feedback sessions take place. The company intranet tracks staff attitudes and invites suggestions. Enhancements to the working environment were made following staff suggestions. Ideas are rewarded with cash awards on a sliding scale. The company works with the professional institutions dealing with management, marketing and personnel and development, and pays the fees of those taking professional qualifications in these disciplines. It has also added resources to enhance its in-house training capability and facilities. ClinPhone has won an American Business Award, two Queen's Awards for International Trade and Innovation, and was ranked 47th in the 2003 "Sunday Times 100 Best Companies to Work For". From turnover of £4.8m in year 2000, turnover in year 2004/5 will be over £28m with commensurate "bottom line" impact. The total workforce of 70 people in 2000 has grown to 412 globally in 2004. ClinPhone works in its local community by providing assistance to the Notts County Football in the Community (FITC) scheme, a registered charity affiliated with Notts County Football Club which works with disadvantaged children. And its teams can recharge their batteries by bidding for cash from the "Fun Money" scheme which they can spend on their choice of activity, be it paintballing, visiting a theme park or off-road driving. The company is now committed to achieve all three Investors in People Models.	Unclear how financial benefits are attributable to IiP introduction. Other benefits are qualitative in nature, or cannot be directly attributed to IiP status.
Clinton James	20	Clinton James' turnover has increased from £70k to £370k in the time since the business was established. <ul style="list-style-type: none"> • Profitability is currently at the industry average of between 11 – 14% of turnover with the aim of exceeding this in the next 12 to 18 months • The organisation now has 20 employees and has plans to further expand in the future. • Clinton James has reached the L'Oreal Colour Trophy regional finals eight times and was the winner of the L'Oreal Colour Trophy in 2000, finishing amongst the top 8 Hairdressers in the Country. 	Unclear how benefits are attributable to IiP status.



Organisation	Size	Stated result	Commentary
CP Centre	50	<p>Since being accredited to the Standard, The CP Centre has also made employees more aware of the need to meet all its goals in areas such as preparing a business plan, reviewing processes and training.</p> <p>The Standard has made employees at the Centre realise that they need to devote quality time to making their aims achievable and not be 'distracted' by day to day operations. Everyone at the Centre now knows that they have to strike a balance if the organisation is to be around in the long-term. Investors in People has highlighted the ways in which this can be achieved more efficiently than was previously possible.</p>	Benefits are qualitative, with limited specificity.
Cumberland Pencil Company	75	<p>The company uses Investors in People recognition actively on recruitment material: "In the past we have never had problems in recruiting good people, and our current workforce is very stable" says Barbara Reynolds. "But it might be different in the future, and Investors in People could start to encourage people to choose us rather than other employers."</p> <p>The company operates in very competitive world-wide markets; factors like the high value of the pound cannot be ignored and there is no escape from the need to improve products, customer service, productivity and all-round business performance continually. "Results are coming through all the time" says David Sharrock, pointing to good quality performance and people working on the shop floor coming up with ideas to take the company forward.</p>	No outcomes stated that are linked to IiP introduction.
D3 Office Group Ltd	18	<ul style="list-style-type: none"> • increased turnover and profitability • improved productivity • increased staff motivation • clearly defined business goals • people clearly understand how they contribute to our continued success 	Benefits neither quantified nor clearly attributable to IiP status.
David Cunningham Associates	8	<p>Investors in People recognition was achieved in May 2003, less than one year after the buyout in July 2002. David Cunningham Associates became the first firm in Essex to obtain Investors in People recognition under the new SFI, a £30 million scheme set up by the Department of Education and Skills.</p>	No outcomes stated that are linked to IiP introduction.
Deeside Furniture Limited	440	<ul style="list-style-type: none"> • The company's sales to its main customer Marks & Spencer, have increased steadily each year. • We have been able to revitalise the local employment market and helping to sustain rural communities, in and around Holywell area. • The company's auditing of 'valid return rate' on below-standard products, has shown a progressive fall in complaints and returns as the quality of production and service increases each year. • The business has succeeded in retaining the skills and experience of long-term employees, through a policy of internal promotion 	Unclear how benefits are linked to IiP status.



Organisation	Size	Stated result	Commentary
DEFRA	8,500	"It has kept us focused on where we need to go," she explains. "Throughout the move to Defra and the subsequent direction the Department chose to take, it has helped support the change programme." Defra's policy of open communication has ensured that people have been regularly informed of developments and, as a result, have generally accepted them. "Before the changes were announced we determined that the best approach would be to be very upfront about the changes and communicate well," says Sandra. "Investors in People has provided a benchmark for handling that change and has ensured that people were involved throughout. "We undertook an internal healthcheck among our financial service after people moved to York for example. The outcome was extremely positive. I believe we have an example of best practice in how to best manage the relocation of a major part of an organisation. "The whole process has shown that, even though there will be pockets of resistance to change, if the process is managed well and you engage people, the end result can be good." And of the overall impact on the organisation, Sandra adds: "Investors in People has helped us move from an old-fashioned department to an outward-looking, modern, vibrant organisation. Having the Standard as a basis for external assessment has been a driver for that change."	Benefits are qualitative, with limited attribution to IIP as opposed to broader change initiatives.
Dinnington Comprehensive School	130	<ul style="list-style-type: none"> • Student performance has gone up from 38% - 47% A* - C in GCSE • 96% have qualifications when they leave • Many staff are being promoted internally and externally • Much better teamwork amongst staff who are now sharing good practice • Very good OFSTED inspection October 2001 • Whole school improvement Award from DFES shared by all staff • School has become more attractive for new staff • In 2005 we achieved Specialist School status in Science and Engineering which compliments our Investors in People status. 	Unclear how measured benefits are attributable to IIP status. Other benefits are qualitative.
DMS Consultancy	15	The company is now considering the Business excellence standard, which is similar to Investors in People but takes a more 'holistic' business view, considering business finance and planning as well as human resources. The company also offers Chartered Management Programmes now as part of its product portfolio.	Case study suggests that IIP impact has been limited.
Du Toit Farming Estate	185	Mackenzie says it was encouraging to note that the estate is on the right track as far as good people practices are concerned, "However, there is still room for improvement and I have written a productivity plan to focus on our shortcomings."	Case study suggests that IIP impact has been limited.
Dyke Yaxley	84	"We did get good coverage of our achievement through the TEC and in the local media. It has all helped with building up our profile with local businesses." John and his colleagues stress that the main benefits from becoming involved with Investors in People have come through the whole process - bringing the firm together behind clear objectives and helping transform training, communications and commitment. There have been several direct marketing benefits: introductions to clients have come through Investors in People Networks, and several current clients, banks and other intermediaries have made favourable remarks about Dyke Yaxley's Investors in People achievements. Through a combination of efforts - including Investors in People - the practice has seen a net gain of more than 100 clients over the past 12 months. Interestingly, another outcome from the partnership's new standing in the local community has come from enquiries from other firms about joint venturing or outright merger. "We're seen as having good systems, very good people, and know where we're going" says John Dodds: "Some professional services firms know they are a long way behind in these areas, and want to take advantage of doing things the way we do them."	Benefits relate to PR and networking, with unclear business linkage.



Organisation	Size	Stated result	Commentary
Edinburgh International Conference Centre	61	The implementation of the process has been vital," comments Geoff. "In the service industry and in particular in the hospitality industry we are dealing with people. By working within the framework provided by Investors in People we have been able to achieve consistency, efficiency and run successful events." The EICC has achieved dramatic results for the regional economy since it was created and has undoubtedly achieved world-class status. It has also increased its operating profit by over 400 per cent. "Occupancy is increasing and, in line with our target, we have generated over £149.5 million for the local economy," confirms Geoff. "We also compare well with other venues around the world where the EICC is the fifth highest occupied venue and the fifth top venue at turning over its space."	Benefits are either qualitative, or are difficult to attribute to IIP status.
Ellesmere College	110	<ul style="list-style-type: none"> • Pupils benefited from the better structure for spending money • Staff have taken accredited courses on board. • ICT skills have improved: staff are more confident both in delivery and working with students • Whole school - Excellent OFSTED -They were part of a pilot project on stress management, which may eventually link into a Work/Life Balance project. This was made easier by being part of Investors 	Benefits are either qualitative, or are difficult to attribute to IIP status.
Emmaus Projects	37	According to Jackie, as well as the kudos that goes with Investors in People accreditation, the Standard helps people to realise that their contribution is worthwhile and valued, which is particularly important in a voluntary organisation. "You can begin to wonder after a while whether you are really recognised and appreciated – even though you know you're doing something very worthwhile In this sector, demand always outstrips supply and it's easy to wonder whether you can ever meet the need or make a difference. The perspective offered by Investors in People reminds you that the answer is 'yes'. It helps you to pull together as a team, looking at the whole picture and not just at your part in it."	Benefits are qualitative and relate to 'baseline' framework introduction.
Escrick Park Estate	8	Each member of the small team is a confident and committed contributor who knows that the Estate supports their continuing development to achieve their full potential in administering and managing projects. Everyone has benefited from IT skills training. A range of training from craft to professional level qualifications has been provided to meet individuals' needs and circumstances, and this programme continues. The team's efforts have contributed to a thriving business with improving cashflow, good feedback from satisfied tenants and 99% occupancy of all properties. Escrick Park has won a 2003 National Training Award and a Learning & Skills Council Award. It also has won a RICS National Building Conservation Award and other building awards for farm and country buildings, the Estate Office and for good design and construction.	Unclear how benefits are attributed to IIP status.
Eurest National Accounts	15,500	We measure our results in a number of ways," says Anne. "Obviously the usual financial indicators, but also the amount of each client's business we operate, staff satisfaction and turnover of labour. "We have reported positive results in all four categories." Eurest also discovered that, as a result of the initiatives it had undertaken, its people are more content, which has had a direct impact on the bottom line. "We conduct an annual staff satisfaction survey," explains Anne. "Since introducing these new measures the overall satisfaction levels have increased to 84 per cent. This in turn has helped reduce our staff turnover, which has reduced dramatically by around seven per cent." Anne is no doubt that Investors in People has made a major difference to the business. "Using Investors in People as a framework has been of huge benefit," she concludes. "It has given us the impetus and direction needed and provides tangible evidence of our achievement."	Unclear how impact was attributed to IIP given the introduction of multiple parallel initiatives. Other benefits are qualitative in nature, reliant on individual perspective.



Organisation	Size	Stated result	Commentary
Eversheds LLP	4,000	Eversheds achieved the Investors in People Standard across its UK business in March 2004. And independent endorsement of Eversheds' commitment to staff development has been resounding. For the fourth year in a row the firm has been voted one of the top companies to work for in the UK in the annual Sunday Times survey. The award makes it one of a very few law firms to consistently receive this accolade from its own people. Among the findings were that 63% were happy with their work-life balance, 72% think their work is stimulating and nearly seven out of ten are excited about where the business is going. Furthermore 69% claim to 'love working for the organisation'. Eversheds also carries out its own quarterly employee satisfaction survey among a percentage of randomly-selected employees. Recent results found that 78% said the firm was a great place to work. HR Director Caroline Wilson, is delighted about the success: "To receive such emphatic endorsement from our own people as well as our peers in the industry is fantastic. "Investors in People has given us direction and framework for developing our communication and training programmes," she concludes. "As well as a valuable external assessment, an important factor in its own right, it has given the whole process a real momentum."	No linkage apparent between IIP recognition and Sunday Times ranking: case study implies that Eversheds received high rankings before IIP recognition.
Exel Automotive	1,850	Exel now has around fifteen licensed reviewers around the country. Twice a year they carry internal reviews across every location to make sure the Standard is being upheld and carry out 'health checks' on locations before external assessments take place. "Investors in People made it clear that if we were going to make our business better we needed to do far more with our people," says Clive. "It has helped us reappraise the organisation and assess how well we manage people and get the best out of them. It has also made our business processes much more uniform. "Thanks to Internal Review we are much more aware of our people's skills than we were before – and better at helping people apply those skills to their jobs," he says. "Although we did this before, it wasn't top of our business agenda." "We have also worked alongside one of our major customers, BMW (UK) Ltd at Bracknell to the benefit of both parties." In 2003 Exel and BMW made a joint approach entitled "Exel and BMW, Parts Logistics" and the combined team then received joint recognition. The independent IIP auditor said of the partnership: "It is very evident that there is commitment from managers to promote the development of people, both for the benefit of the operation and of individuals. In an environment where 'more has to be achieved with less', putting a great deal of thought into developing people is a key strategy to improving productivity." For Exel, Investors in People is a continuous journey. It hopes to have most of its remaining sites registered by the end of the year and is planning to bring its other management business support functions – such as Human Resources, Solutions, Project Management, Development and Finance - on board. "Investors in People has been a revolution for us and having internal reviewers has underpinned the process," concludes Clive. "It has helped us control our costs and made us more accountable. By doing it ourselves we've found out so much more about the business and how people investment can really improve the performance of an organisation like Exel."	Benefits are qualitative in nature and of limited specificity.



Organisation	Size	Stated result	Commentary
Farrelly Facilities and Engineering Ltd	50	<p>Staff turnover - one of the prime reasons for starting Investors in People - has been reduced by over 70%. Similarly, absenteeism has been slashed. Turnover has doubled over the last three years. Sales and profits have both improved significantly year on year. The way the organisation now works, and what its people feel about it has changed beyond recognition. "The pay cheque is important, but it's the job that's the trophy." As one of the first advocates of work-life balance principles, the company has found that flexibility works both ways - benefiting people and performance. Farrelly Facilities recently won the "Employer of the Year" award against stiff and better-resourced competition. It is a host exemplar company for the "Inside UK Enterprise" Initiative. The company was a winner in Investors in People UK's "Tipped for Success" competition and director, Gerry Farrelly, went on to become an Investors in People Ambassador. In his words, "Investors in People is the best business tool we've ever used."</p>	<p>Unclear how attributable the reduction in turnover is to IIP introduction.</p> <p>Qualitative benefits appear to relate to the introduction of 'baseline' processes.</p>
Francis Clark	225	<ul style="list-style-type: none"> • partners and staff have an agreed, recorded focus for the future • improved communication strategies established • improved training and development opportunities for non-professional staff • establishment of an ever-evolving appraisal system • staff acceptance of responsibility for their own careers • closer staff involvement with identifying training and development needs • increased staff involvement and motivation • new information technology providing effective and cost-efficient systems • IT systems enable partners to monitor and evaluate business operations and results • business plan targets achieved • financial targets for the last year met • increasing market share in niche area between local practices and large nationals • ISO 9001 accreditation achieved • productivity at all levels constantly improving. 	<p>Benefits are qualitative and have inconsistent linkage to business outcomes.</p>



Organisation	Size	Stated result	Commentary
Friends Road Medical Practice	17	<p>"We have been able to achieve all of our organisation objectives including the 'Quality & Outcomes Framework (QOF)', which are clinical and organisation targets set by the Government. This achievement can be attributed to Investors in People because all the team members are working together and know the objectives and have ownership of these. We have, as a direct result, become a much more open and trusting organisation and everyone, irrespective of their role, is involved in the planning, setting and the achievement of the objectives." As a direct result of these initiatives, Friends Road has seen a significant reduction in employee turnover. It used to have at least two to three staff vacancies each financial year whereas as today its 'newest' employee has been there for almost four years! The Practice now has one of the best staff retention rates in the area and the lowest level of sickness with rates down by 35 per cent. "Investors in People also taught us the importance of evaluation and review," comments Karen. "We are now able to measure our performance, identify gaps and continuously review and improve on what we are doing as an organisation. Initially we thought in terms of integrating Investors in People into the culture of Friends Road but it is more than that because it is our culture, it underpins all that we do as an organisation." As far as the end customer goes, the Practice has witnessed increased confidence amongst its staff and improved skills, which has lent itself to a higher level of service. The Practice is subject to an annual patient satisfaction survey conducted by the Public Health Department. It selects 800 of its patients at random and asks a series of questions that come under 43 headings ranging from clinical experience, access to services and premises to attitude of staff. "The level of service our patients are now receiving has resulted in a significant improvement of customer satisfaction levels across the whole Practice," says Karen. "The local and national average is approximately 75 per cent; our Practice has improved its performance by an average of 11 per cent and has an approval rating that averages 86 per cent. We are consistently in the top five per cent of all Practices."</p>	<p>Unclear to what extent any benefits are attributable to IiP, given the introduction of other initiatives (e.g. QOF).</p>
Frimley Park NHS Trust	2,620	<p>The benefits of the Investors in People process are already numerous and highly visible within the Hospital. Because planning is a crucial Investors in People criterion Frimley Park replaced their existing processes with a more structured routine. The Hospital also focused more closely on the time and money required to improve the way training and development resources are managed. The Investors in People criteria have added a formal structure to many of the Hospital's key working practices. These are measured against the service objectives, which means that the patients receive far higher standards of care. "Morale is higher now than in the past," enthuses Eleanor Shingleton-Smith. "Because people are personally involved with Investors in People they see a clearer purpose to their own jobs. Non-priority tasks are filtered out and there is a stronger focus on the main task in hand."</p>	<p>Benefits are qualitative with unclear linkage to IiP status.</p>



Organisation	Size	Stated result	Commentary
Fujitsu Services	18,000	<p>"Our decision to source talent internally for much-needed account managers won us a national award from Personnel Today at the end of 2005 for Innovation in Career Development," says Ian. Previously there was strong dislike for the appraisal process and the associated paperwork throughout the company. Now, there is a greater understanding of the process and people are able to see the benefits. As a result resistance has almost fallen away.</p> <p>Ian adds: "Our staff retention rate is envied across the industry and we are consistently rated in the upper quartile – no mean feat given we have 18,000 staff."</p> <p>Fujitsu's regular employee opinion surveys generate invaluable feedback. It forms action teams around the results and is able to evaluate the real impact of training. It then empowers these action teams to make the changes staff are asking for - this is again reflected in employee feedback. Fujitsu is also enjoying increasing success in recruiting high calibre staff, due in no small part to its culture and market image.</p> <p>Although difficult to put an exact figure in terms of revenue, it is clear that major business opportunities would be out of Fujitsu's reach without Investors in People.</p> <p>"Without the Standard, we would probably rule ourselves out of a significant number of potential Government contract bids," continues Ian. "In terms of lost opportunity cost this would equate to business of the magnitude of several million."</p>	<p>Unclear how stated benefits are quantified or attributable to IiP status.</p> <p>Comment relating to IiP's role in Government contract bids is revealing.</p>
GISDA	31	<p>The quality of client support has improved, through increasing the knowledge, skills and confidence of staff who work with Gisda's client group.</p> <ul style="list-style-type: none"> • A 'Basic Living Skills' project is being developed as a modular, accredited training programme, to be delivered to clients and school pupils within the area. Its aim is to reduce the need for organisations such as Gisda. • The organisation now operates to agreed standards, set by the development of up to date and relevant policies. • In order to conform with the Qualification Framework for the Social Care Sector in Wales, the company will be setting up training for all staff to ensure that they meet with the standards set out within the document. 	<p>Qualitative benefits with limited linkage either to IiP or organisational outcomes.</p>
Hampshire Deaf Association	43	<p>"Productivity is up by 40% because Investors in People has given us a focus and helped us to stay on the right track." "Investors in People gives you the focus you need to develop and improve. It has helped us to improve both productivity and the quality of our services" "People are now driven. There is now a lot of team-working in achieving our objectives- something that develops naturally as part of the IIP process"</p>	<p>Unclear how stated benefits are attributable to IiP status.</p>
Hampton House	18	<p>Since achieving the Investors in People Standard in March 2001, Hampton House has higher staff retention, improved training and internal communications and is an efficient and profitable business. All of this has resulted in even better care for residents and Hampton House now has a good reputation in the industry and local community.</p>	<p>Benefits unquantified and unsupported.</p>



Organisation	Size	Stated result	Commentary
Hanslope Combined School	287	<p>Recognising Russell Fancourt's success in his 16 year tenure as headmaster at the school, the local Education Authority has asked him a number of times over that period to transfer temporarily to other schools that had an unexpected vacancy or a specific need for which he was suited.</p> <p>"Until we achieved the Standard, I had always found myself turning down their requests", reflects Russell. "I've always been confident about the team at this school and how we work together but somehow I always felt as if I needed to be here as part of it. Investors in People has shown me that I can have complete faith in them as a team and as individuals and that they don't need my presence here all the time. Armed with that increased sense of confidence, I accepted a temporary post at another school for the very term after we achieved the Standard.</p> <p>"I know that I still have a lot to bring to Hanslope, but it gives me great confidence to know what a strong contribution every member of staff makes. While I always knew that, working with Investors in People helped me to recognise its significance and has meant that I can leave them to get on with it. The Standard has given me enormous confidence in the future."</p>	Unclear how benefits relate to organisational outcomes.
Happy Computers	49	<p>"Our staff turnover is half our industry average. Indeed of the two who left in the last year to take up work elsewhere, both phoned us within two weeks of leaving and asked for their jobs back. Naturally we welcomed them back," says Cathy. "Staff attendance has also improved with sickness absences reducing dramatically over the last couple of years. We have also introduced return to work interviews and a wellness bonus to help with this." Perhaps a key area where Investors in People has helped most with the direct involvement of its staff is in how Happy collects and uses their feedback. Investors in People is not something separate to our organisation, it is just part of our culture. It shows us where we are doing well in the same way that making our people feel good about themselves is also part of our culture."</p>	Benefits are qualitative and not clearly attributable to IIP status.
Havant Signs and Plastics	38	<p>The Standard has also enabled the workforce to raise its level of professional working standards and external qualifications which embraces the journey of life long learning that runs along side any successful company.</p> <p>The result activity in the signs division continues to grow, profits and sales have improved, morale is high, staff turnover is down and reject rates have fallen by a third.</p>	Benefits are either unquantified, not specific or unattributable to IIP status.
Hawtonville Junior School	25	<ul style="list-style-type: none"> • An enhanced reputation within the community • Continued improvement in SATs results • More and better use of classroom observation • Better value for money • Better planning as highlighted in the Investors in People assessment report • Better communication • Improved evaluation, though some aspects need even more formalisation • The success of staff in securing promotion. 	<p>Unclear how benefits are attributable to IIP status.</p> <p>Benefits are generally qualitative.</p>



Organisation	Size	Stated result	Commentary
HF Holidays	350	<p>HF Holidays continues to grow, introducing not only new holiday "products" - particularly abroad - but adding to and upgrading its Country House hotels within the UK and Ireland. The company consistently earns a financial surplus for re-investment and development of its holiday base. Ray Chandler stresses that a lot of factors are involved, but is glad to point to this important role of Investors in People. "Our guests can be very critical - but customer satisfaction at many of our Country Houses has been reflected in 99% 'good' to 'very good' ratings lately. On our kind of holidays above all, the contribution of staff is essential to getting this level of satisfaction." High customer satisfaction is also demonstrated in the 80% repeat bookings figures HF Holidays achieves. HF Holidays use the Investors in People logo extensively on marketing, booking and recruitment literature. 'Investors' plaques are displayed at all the hotels and "our members (who are very frequently our customers) are very proud of what's been achieved" says Ray Chandler. "When it comes to recruitment 'people in the know' are starting to comment on Investors in People recognition" says Andy Berlyn, Walking Operations Manager. "We need to recruit several hundred holiday leaders each year, who have to be really knowledgeable about their subject, but may work for us for only a couple of weeks each year. That's not always easy, and I'm starting to hear positive comments about what Investors in People means from these people." Feedback from leaders on changes introduced as a result of Investors in People has also been positive says Andy "as they increasingly take ownership of their own development and get structured feedback from HF staff on performance development issues."</p>	<p>Unclear how financial and customer benefits are linked to IIP status.</p> <p>Other benefits are qualitative.</p>
Hilton Meats Cookstown Ltd	65	<p>Having gone through the Investor in People process, the Company has developed a structured training procedure. 98% of the workforce have attained a formal qualification at NVQ Level 2, with 95% of this figure achieving level 3 by March 2001.</p> <p>"Because of the number of staff gaining professional qualifications we introduced a formal presentation ceremony to recognise and reward the achievement of our staff. We close the factory for half a day and invite all staff to attend, helping to create a sense of community and pride amongst the workforce. If someone had told me that, using Investors in People, we could reduce staff turnover from a depressing 42% to just over 8% in 2 years, I wouldn't have believed them. But it's gone further than that! By concentrating on training we have also reduced our accident rate by 66% and our product rejects have been reduced by an amazing 40% in the same period."</p> <p>"Investors in People has also affected how we communicate with staff. Hilton Meats is the kind of company staff are proud to work for because they have a say in what is going on. We conduct an employee survey up to four times a year, getting vital feedback on issues such as employee satisfaction, health and safety, wider HR issues and even about the culture of people investment. Everyone feels they have a voice within the Company and that they are consulted about what goes on. The monthly staff Works Committee meetings also ensure that there is two-way dialogue. Five employees, representing each of the departments, plus two managers have been elected to sit on the committee. Things are working well and the meetings ensure that staff are informed and consulted about important factory issues. Investors in People has helped us to become more focused, realising that our most important asset really is our people. Staff are happier and this is reflected in productivity which has increased by 35% since 1996, and you can't argue with that!" adds Leslie.</p>	<p>Unclear how specific benefits are attributable to IIP.</p> <p>Qualitative benefits relate to introduction of 'baseline' communication processes.</p>



Organisation	Size	Stated result	Commentary
Hinckley Equestrian Centre	6	Certainly, the growth that Philip's business has seen over the last 2 years has been phenomenal. The Centre is now involved in many different areas of training for young people, from school leavers to university graduates. As Philip is quick to point out "There have been and will continue to be massive changes to the industry over the next few years. We need to ensure that we try to keep a step ahead and work with the changes to keep our businesses prospering." With business booming and training at the forefront, Hinckley Equestrian Centre is sure to do just that.	No apparent IIP benefit stated.
HMV UK and Ireland	5,500	Working with the Investors in People Standard has helped our employees recognise the importance of day to day development. People can see clearly the knowledge and skills they've already developed and what knowledge and skills they need to become managers. This has been critical for developing future managers and supporting our expansion plans," said Steve West, Head of Learning & Development HMV. Just 12 months after the launch of CDP, knowledge in critical areas increased by twenty per cent. This has had a considerable impact on stock management efficiency and has also helped to raise the standard of customer service. "Investors in People has helped us communicate the dynamic career opportunities that are open to people who join HMV. It has also helped to provide a structured framework to continuously support and stimulate the development of existing staff," concluded Steve West.	Stated benefits are either qualitative or cannot clearly be attributed to IIP through the rollout of the separate 'Continuous Development Plan'.
Horton CE Primary	8	<ul style="list-style-type: none"> • Staff attitudes towards each other improved • Enhanced school ethos which is rubbing off on children • Greater acceptance within local community and groups 	Benefits are qualitative only.
IBM UK Ltd (Greenock campus)	2,416	Investors in People is a very useful method for a company that is seriously interested in attracting and retaining the services and commitment of talented staff. It helps to ensure that lofty mission statements are converted into meaningful processes to communicate on company strategy, business objectives and performance standards. It also provides a formal focus on how the company develops their employees to successfully contribute to the company's business goals.	Limited specificity of benefits; qualitative assessment only.
Johnson Controls IFM UK Ltd	4,000	"Recognition under the Investors in People Standard is important in our industry. Investors in People provides a company with clear action plans and helps it to get the best out of its people."	Limited specificity of benefits; qualitative assessment only.
Johnston Carmichael	250	"Since achieving recognition, more staff than ever before are undertaking professional and vocational qualifications which means we can continue to build on the extensive range of high quality services to clients. Staff turnover levels have remained consistently below average. The staff induction procedure has improved and even relatively new members of staff can communicate the firm's main objectives coherently and enthusiastically. Exit interviews are now carried out, allowing us to respond to any problems highlighted by staff leaving the firm. All vacancies are advertised internally now as well as externally, so that staff are more aware of the opportunities available to them."	Qualitative assessment apparently relating to the introduction of 'baseline' processes.
Kelly (South Africa)	50	According to Czakan the pilot programme proved phenomenally valuable to the company. "The assessor, Barbara Marsh, shared our values and was equally committed. She gave us comprehensive feedback, including some minimal developmental areas, and this has provided direction to help us continue to improve".	Case study suggests limited benefit.
Kirkwood Fyfe	16	Embarking on Investors in People meant restructuring our business in several areas. The creation of a management team and clearly defined roles for our employees was matched by enthusiasm and a renewed desire amongst all our employees to contribute to business success and customer satisfaction. The creation of team spirit has carried over into a desire for the business to succeed, and for customer satisfaction to achieve ever higher levels. The corresponding boost to morale has been noticeably 'fed back' to patients by the confidence and pride all our employees had in their work.	Qualitative benefits only. Unclear the extent to which they can be attributed to IIP status.



Organisation	Size	Stated result	Commentary
Komatsu UK	700	"Komatsu UK has become established as a major manufacturer and exporter in Britain and our people are one of the important factors behind that success", claims Tracey. "We know that they are committed to building the business and Komatsu is equally committed to building their future because we see the two things very much as the two sides of the same coin. "Achieving the Investors in People Standard annually is a reflection of our belief in our people and the high level of employee retention demonstrates that people enjoy working here. We have a lot of good programmes in place to help our people achieve both their potential and that of the business. The company's overall success tells me that we're getting things right."	Case study suggests limited benefit beyond PR.
Landsdown Clinic	18	The Clinic received Investors in People accreditation in November 2000 and was successfully reviewed in 2003. In 2002 the clinic was highly commended as one of Gloucestershire's outstanding organisations.	Unclear how benefit is attributable to IIP.
Leeds South Methodist Circuit	17	"I think that the biggest benefit we have seen as a result of Investors in People is that people are much more motivated and valued. We now help people to do more rather than just giving them more to do, and it has given us a structure to work to. It is still early days but by keeping it on the agenda we can make it work for us." Neil is now an advocate of the Standard and recommends that other faith organisations consider it. "Investors in People has made us realise that we really needed a quality assurance. It was the process that was the most valuable and it has certainly helped us to take a step back and be more objective about what we are doing."	Benefits are qualitative and relate to the introduction of 'baseline' processes.
Lloyds TSB Group plc	70,000	"Every business unit is now able to articulate the benefits of having prepared for assessment: be that making staff feel more valued, making everyone feel more motivated or improving staff retention rates," says Steve. Lloyds TSB uses the balanced scorecard across the Group enabling it to clarify both its vision and strategy and to translate them into action. It is used to provide a framework for feedback around both the internal business processes as well as the external outcomes which in turn helps the organisation to continuously improve performance and results. "Once again, one of the key benefits of achieving the Standard has been the impact on our people. Staff now feel they have that all-important clarity. They can see a much clearer link between what they do and the overall aims of the organisation. By presenting the information in a consistent format we can all see how what we are doing is contributing to different elements across the board." Processes are now managed more effectively which enables people to operate more efficiently. People understand better their role and what is expected of them. The Standard ensures they have the right skills and confidence to do that. Steve concludes: "Each business unit Managing Director is charged with embedding the principles of good people management and Investors in People gives them that all important external perspective."	Benefits are qualitative, with some apparent attribution to 'balanced scorecard'.



Organisation	Size	Stated result	Commentary
London Heathrow Marriott	200	Associates and customers alike have benefited from the Investors in People process. The Marriott ethos is that giving associates an exceptional environment in which to work - and the right tools to do the job – means happy customers who will come back to the hotel and recommend it to others. Just as importantly, the company's shareholders will be satisfied because they will be achieving a better return on their capital employed. The results speak for themselves. In an associate survey carried out after the first six months of operation, 88% said they were happy with how they were employed and trained by the hotel. This was a top score amongst London hotels and the third highest in the UK. At the same time, customer satisfaction was 80% and in the first year of operation this translated into the business being £2m over budgeted revenue. Since the opening, the commitment of the hotel's management team to Investors in People has not waned. Anne Davey believes there are still new challenges ahead. In an external business benchmarking survey the hotel scored highly - evidence that it is continuing to implement, evaluate and refine the procedures that it committed to at the very beginning of the process.	Without a pre-IiP baseline, it is impossible to attribute survey benefits to IiP implementation.
Lyness Accountancy	9	"Our organisation believes 'what you can measure you can manage,'" says Sue. "All individuals are now aware of their individual targets and we have seen real motivation kick in when the targets have been reached." Lyness evaluates the impact of learning and development through monthly KPIs including team happiness and sickness levels. Team happiness features on its 'One Page Plan' and has a knock on effect to other areas such as sickness levels. As a small company Lyness cannot carry much sickness so it offers people BUPA cover after six months. This means staff do not have to wait for physiotherapy after an operation or can have a routine operation at the weekend for example. "The impact of this is that staff really have a give and take attitude and they want to support their team," explains Sue. "We passionately believe a well-trained and happy workforce reward you many fold. Our performance certainly substantiates our beliefs and it's very difficult to argue with actual results." Lyness was the fourth company in the Black Country to achieve Investors in People recognition in Work Life Balance and it is part of the embedded culture. Sue says: "We managed to recruit a much sought-after fully qualified accountant who said that our Investors in People recognition and work life balance ethos had a direct impact on his decision to join us."	Benefits are qualitative in nature and not clearly linked to business outcomes.
Manningham City Council (Melbourne)	n/a	Investors in People has helped the Council to achieve its perennial goal of getting the same output for less cost - without neglecting the human consequences in the process. The recruitment and retention of 'top level performers' can be an issue in the Australian public service sector. By introducing better employee development processes and giving a top down signal that people really are its most important asset, Manningham City Council has been able to improve motivation, increase customer satisfaction and reduce costs. Low staff turnover levels of only 12% and customer satisfaction ratings of 98% are both attributed in part to Investors in People.	Unclear how any benefits are attributable to IiP status.
Manorbrook Primary School	23	<ul style="list-style-type: none"> • Major impact on staff morale and teamwork • Much better ethos and atmosphere • Standards across the board improved 	Benefits are qualitative and it is unclear how they are attributed to IiP status.



Organisation	Size	Stated result	Commentary
Menzies Chartered Accountants	10	For Menzies, one of the main benefits of achieving the Standard is greater communication between employees and partners - a two-way process which allows everybody to appreciate where the company is going and why. Says Richard: "Having these systems in place helps to get everybody working in the same direction. It means we tell people more, we are more open and we are better at passing information down the line. Investors in People has helped us to involve everyone with the firm's plans for the future. Because people can see what direction we are going in they are more able to buy into it." Employees also feel more able to talk through any concerns - and not just at employee appraisal times. In short, people are now 'happier in their working life' according to Richard. While he describes the process of working towards recognition as 'challenging', Richard says the Investors in People process has achieved some important aims, particularly in helping the company to formalise its existing practices - and make them work for it more effectively.	Benefits are qualitative and relate to aspects of communication through introduction of 'baseline' processes.
Metronet Rail		"We are looking closely at how we can quantify the effectiveness of Investors in People within Metronet but it is clear that communication has improved and that our people have a better appreciation of their roles within the business. Internal Review has proved critical in embedding the Standard in the way we work. While there is major change going on, we are creating a new culture within Metronet and Investors in People is very much at the heart of that. "Although there is still much work to be done, we're a lot further on than we were two years ago and I expect Metronet to have moved even further in the next two years. We are creating the foundations of a truly positive culture and we have the opportunity to develop that into the service that has always been envisaged. Given the circumstances we've faced over the past three years, what we've achieved has been truly remarkable", Karen concludes.	Benefits are qualitative, with the case study apparently questioning how effectiveness of IiP can be evaluated.
Monteaths Accountants	10	Since achieving the Investors in People Standard, Monteaths has achieved the rapid growth it needs, gaining new clients both from increasing the company's marketing activity and because their reputation has grown in the local market. "The Standard means a great deal", says Paul. "It sets us aside from our competition and gives our clients confidence that the firm they're employing is good because it in turn looks after the people it employs. It really is a measure of excellence."	Benefits are qualitative and based on individual perception.
Motiv8	60	In order to remain flexible and to meet the needs of the individual young people, it is essential that employees and voluntary workers are equipped with the skills to make this possible. Motiv8 employees have developed a greater understanding of the purpose and value of their work and their opinions as a result of working together with the Investors in People Standard. Staff are regularly kept abreast of information, through team meetings, staff meetings, one to one support (both internal and external) and through the continuing process of supervision and appraisal. People understand why they are trained and supervised, and this allows them to know that they are an integral part in the development of Motiv8's future. This in turn makes them more confident, motivated and effective in their work. Investors in People has been a valuable tool in the development of Motiv8's business plan and systems, allowing us to work more effectively in reducing the number of young offenders. The Standard to which we now work has helped us to grow and will provide internal strength for our growth in the future.	Benefits are qualitative, with limited attribution of organisational outcomes to IiP status.



Organisation	Size	Stated result	Commentary
Nationwide Building Society	15,600	Nationwide's business results have improved year-on-year during its long involvement with the Standard. Employee retention and recruitment haven't been problems. Staff attitude survey results have improved year-on-year, particularly in employee communications and satisfaction ratings. Positive responses to the key statement "Nationwide is where I want to work" increase each year. Nationwide was ranked 18th in the Sunday Times 2004 "100 Best Companies to Work For" awards. It was "Number One Provider of Overall Service Response" in the 2003 Institute of Customer Service Awards and is "Which" magazine's "Top Financial Services Provider" along with many other financial services and sector press awards. In February 2004, Nationwide achieved assets of over £100bn.	Unclear how benefits are attributable to IIP status, particularly regarding any improvement in business results.
Nationwide Building Society (Internal Review)	15,600	"Working with Internal Review has helped us to build assessment capability across the Group, continually driving continuous improvement whilst maintaining an external perspective", says John. "We have been able to maintain a better appreciation of the use of the Standard internally and also see how best practice can be spread across our operating teams. Most of all, internal assessment has helped us to instil the ethos behind Investors in People throughout the company and ensure that we maintain a high standard at all times. The option to let it slip down the agenda doesn't exist because one of the internal team would pick it up quickly so the Standard has truly become an integral part of the management of Nationwide. The results in terms of employee recruitment and retention are excellent, all of which has an impact on our on-going business results."	Benefits are qualitative, based on individual perception.
New Life Community Church	15	Rob is really pleased with the impact that Investors in People has had on the organisation, "at first it was just me pushing us to go for it, but in the latter stages everyone got involved and when we finished it we all felt a real sense of achievement. It has given us credibility alongside other organisations such as schools, and shown that we take our service seriously and want to invest in our people." "If any other faith organisation asked me whether they should do the Standard, I would say go for it, there is no reason why not. It has been a real learning curve and has been interesting to look back and see where we were compared to where we are today. As a sector that relies so much on its people, it seems such a sensible move."	Unclear what benefits, beyond PR, are claimed within the case study.
NHS Greater Glasgow Primary Care Division Support Services	700	An important benchmark is that all the service contracts that had been lost to outside agencies have now been brought back in-house. This is because we can compete more effectively with the private sector: we have the skills and commitment to deliver them to a higher standard. Support Services now directly employs more people to deliver these services – a tangible result of the positive impact of achieving and retaining Investors in People status.	Unclear how stated benefits are attributable to IIP status.



Organisation	Size	Stated result	Commentary
Northumberland County Council	12,000	Internal Review has proved a major success for Northumberland County Council. "If you thought that there was no time for Investors in People when you're going through major change, you'd be very wrong", says Roy Hugman. "It becomes even more important than normal and the Internal Review process has been a key factor in enabling us to live up to the Standard. It has meant that there's less 'stop, start' about it all because our focus is all about achieving the maximum continuous improvement rather than working to an external assessment schedule, which might take place every three years. "By carrying out internal assessment, the management team has a far better appreciation of what is going on in the organisation; why would you wait for an external Assessor to give you a view of the organisation that you can obtain through your own people? "When it did become time for our 2004 external assessment, the internal reviewers were able to hand over a comprehensive portfolio of internal reviews to the external Assessors and discuss with them in detail what they had found within the organisation. The internal assessment process simply makes the final external assessment a far more confirming review, especially as the external people can question our team in detail and focus their own independent assessment accordingly. "We're nearly two years into this major improvement and reorganisation and while restructuring is important, we have not forgotten that our people are crucial in helping us to achieve our organisational goals. For many of our people, it's been a time of major change but Internal Review has helped us understand how successfully we're communicating with them and assess what we need to do going forward."	Unclear how benefits relate to organisational outcomes.
NTP Ltd	260	The Model has initiated a comprehensive review of which leadership and management qualities the organisation requires. They then assessed which qualities they had and which were lacking. From January all line managers will attend a Line Managers Development Programme where they will explore through workshops what type of leaders they are and what skills they could develop to become more effective. Communication was another issue the Model highlighted as in need of attention. A more rigorous communications process has been put in place that ensures all information is cascaded down through the company quickly and efficiently. The Model has slotted in with the Investors in People Standard and the company's own employee survey to provide a complete analysis process of management policy and effectiveness. The ultimate aim is to use the Model across all business units.	Unclear how benefits relate to organisational outcomes.
Oakwood Eye Care Centre	12	Investors in People has been fundamental to success. Oakwood Eyecare Centre has survived, grown and is delivering what it set out to. In the words of its Investors in People assessor, "it is always one step ahead". People are developed, supported and promoted within the business - one longstanding member of staff has just qualified as a dispensing optician. The company developed and implemented its own approach to work-life balance some time before the Investors in People Work-Life Balance Model was launched. All minds in the business are harnessed in fortnightly staff meetings which review performance and look to the future. A coach works with the team in these meetings once a month to facilitate in order to tackle the issues of the moment and innovative ways around the issues ahead. Oakwood has won a National Training Award for its work on communications and interpersonal skills, vital for effective work both within the team and in dealing with customers with real needs. Staff turnover is extremely low and staff absence levels are estimated to have reduced from 10% to 0.1%. The well-earned reputation of the business delivers an estimated 80% of its customers who come on word-of-mouth recommendation alone.	Unclear how quantified customer benefits are attributable to IIP status.



Organisation	Size	Stated result	Commentary
Old School House Day Nursery	30	Apart from its Investors in People successes, Old School House has been commended for its excellence by the Rural Development Commission and is a winner of the National Day Nurseries Association "Quality Counts" award. The turnover of the business has increased year-on-year, staff retention is excellent and rates of staff absence are well below national averages. In an excellent environment with the resources for staff development from within, the business has grown its own teachers, managers and support staff. And with more development of the business, there come more opportunities for the people. With its reputation and resources the training centre has become a "trainer of choice" with managing agents and it has a working partnership with Cambridge Regional College. Modern Apprenticeships and qualifications ranging from NVQs up to level 4 and to degree-level are offered.	Unclear how multiple recognitions are attributable to IiP status or benefit the organisation.
Oliver Quibell Infant School	25	<ul style="list-style-type: none"> • Refined monitoring of training needs • Better targeted training • Better value for money • Measured progress towards performance targets • A holistic staff/school development plan • High staff morale and greater individual staff initiative • The promotion of the deputy to a Headship • Greater community involvement, right down to the school's participation in a national gardening competition • Greater staff flexibility, midday supervisor as classroom assistant etc. • Individual portfolios. 	Benefits are either qualitative, unquantified or have questionable linkage to organisational performance.
Ondeo Industrial Solutions Ltd	46	"For us the external recognition that Investors in People brings is an excellent way to demonstrate to our customers the standards we set for ourselves but the most valuable information is from the people themselves," says Sara. "In order to develop and grow the business we need to support and develop individuals to work as a team. Investors in People allows us to ensure we are meeting our goals." Apart from gaining Investors in People recognition in March 2004, having undergone a mock audit in November 2003, Ondeo has gained external recognition for their practices from other quality bodies (e.g. ISO 9001 (2000); ISO 14001, and OHSAS 18001) and from industrial organisations who have awarded them major contracts. For example, in just two years, Ondeo has secured major contracts with market leaders such as Chevron Texaco, Conoco Phillips and BP, the Grangemouth plant being one of the biggest users of water from a single site in Europe	Unclear how commercial benefits are attributable to IiP status.
Organic Herb Trading Company	30	"Certainly I would say that the whole working environment here is a lot less stressful since we signed up to Investors in People. Achieving the Standard has been good for the business – and a morale boost for the staff."	Benefits are qualitative in nature, relying on individual perception.
Parkside Dental Practice	19	Jonathon Pugh, senior dentist at Parkside, said: "The ethos of Investors in People is now at the heart of everything we do. " "It is very important for our business to have this recognition. We didn't set out just to have a plaque on the wall. We consider it quite an achievement to have retained a national standard in developing our personnel." "It demonstrates that we work hard to develop our people so that we can look after the people who come to see us – the patients."	Unclear what organisational benefit is being claimed.
Performance Improvements Group Ltd	46	Turnover and profits have increased, there has been more focus on training and we have witnessed lower staff turnover since achieving Investors in People recognition. I am confident that the Investors in People principles have contributed to these results. After seven years, we still enjoy profitable growth.	Unclear how stated benefits are attributable to IiP status.



Organisation	Size	Stated result	Commentary
Pioneer Friendly Society	36	Pioneer Friendly Society is a company undergoing rapid growth. Investors in People has not only facilitated this by standardising and helping to implement a training plan, an appraisal system and better communication between all levels of staff, but it has empowered staff to meet the new and challenging demands placed upon them with the change in working practices. The figures for growth speak for themselves, the company employed 8 staff in 1992. This number now stands at 36 and is growing all the time. The turnover in 1992 stood at £800,000; and for 2004 this has risen to an impressive £8.95 million. The company introduced an appraisal system which enabled staff to communicate their training and development needs and requirements to management. In order to successfully carry out appraisals and obtain measurable outcomes which could be set, evaluated and signed off, the management team underwent appraisal training courses. The company also implemented a training plan which incorporated IT systems training - to deal with increasing demands for speed, efficiency and cost effectiveness with the changing pace of technology, senior management teambuilding training - to supplement the appraisal training already undertaken, and enhance cohesive working patterns and partnerships within the organisation, and finally specialist customer care training - to ensure that customer confidence was instilled from their first introduction to the company. The company also recognised a problem with communications which they sought to eliminate with the introduction of staff meetings. It was felt that this would "break down the physical barriers," as Debbie Naylor put it, and enable all individuals within the organisation to speak freely about matters of concern relating to themselves and the organisation as a whole.	Unclear how organisational growth is attributable to IIP. Benefits claimed are largely qualitative with unclear linkage to organisational outcomes.
PKL Group	140	"We recognise that quality of service and performance can only be achieved through a well trained and motivated team of people," said Alan Kitto, Human Resources Manager. "Investors in People accreditation helps us to attract and retain the highest calibre staff, something our clients have come to expect from us; after all we know that our service is only as good as the people who deliver it" "Investors in People is an effective way of proving to our customers that we are an efficient and professional company. As a result we are now Europe's number one supplier."	Benefits are qualitative, based on individual perception.
Plough and Harrow Hotel	45	"It's been a great success for the hotel. Thanks to Investors in People, everyone is communicating much better with one another and has a much clearer idea of their role in the organisation."	Benefits are qualitative, relating to introduction of 'baseline' processes.
Pontins	300	Pontin's can now give employees more and better reasons for staying with the company. This involves improving their ability to deliver higher standards of service while working at each of the eight Pontin's sites. The retention of the Investors in People Standard is at the heart of this drive. "We aim to reduce dramatically the number of people we need to find, train and retain during our long season," explains Colin Homer. "We will do this by fulfilling our commitment to Investors in People which means improving each and every one of our employees, however short their stay with us."	Unclear how IIP is intended to deliver benefits.



Organisation	Size	Stated result	Commentary
Prestbury House Hotel	23	Prestbury House achieved Investors in People recognition in April 1994, and was the first hotel in Gloucestershire to receive the award. Since then turnover and profit has increased year on year, while the organisation's reputation as a first class hotel – both for staff and visitors - continues to go from strength to strength. Repeat business, (for business and leisure guests), has also increased, as has the number of recommendations – especially for weddings. And in 2001 the organisation won a British Hospitality Association Hotel In Excellence Award. Prestbury House Hotel has also won the 2003 British Hospitality Award for Recruitment Best Practice and are the 2003 winners of the Cotswold Life Magazine Best Staff Development Award. Proprietor Stephen Whitbourn believes that much of the hotel's continued success is down to their commitment to staff training and development. As he said: "The training programmes which we offer our staff are unmatched in the region. Not only does this make us attractive in terms of recruiting staff - and especially college leavers - but it also makes our employees more motivated and dedicated."	Unclear how benefits are attributable to IIP status. Benefits include qualitative assessment based on individual perspective.
Prospects for Young People	120	<ul style="list-style-type: none"> The business has grown from employing 20 Staff, initially, to over 120 today. Prospects for Young People has developed from a single-site Residential Care Home, to a multi-faceted organisation with a number of properties and operational arms. The name of 'Prospects for Young People' is now synonymous with Best Practice and the business provides Training and Consultancy Services, on a Commercial basis, to many Organisations and individuals operating in the field of care for young people. 	Unclear how benefits are attributable to IIP status.
Public Service Reform Unit (Northern Ireland)	50	All staff now feel positively involved in driving towards the attainment of our business objectives. They are involved in the development of the balanced scorecard objectives and measures. Both team and individual performances are clearly linked to organisational goals and training and development needs are also identified in line with our direct business needs. "In addition to the obvious benefits for the individuals themselves, how they interact as a team and their understanding of how what they do on a day-to-day basis impacts our business goals, we have also noted significant budgetary improvements as well as impressive efficiency savings," adds Gerry. "We have also been able to develop new and improved business improvement techniques such as Best Practice in Northern Ireland which we promote through the use of case studies. We have also developed the quarterly Quality Break Programme where we invite key managers along to network, lunch and listen to a guest speaker who can talk practically about their own experiences - again underpinning our commitment to lever change."	Benefits are predominantly qualitative in nature. Unclear how budgetary improvements are attributable to IIP status.



Organisation	Size	Stated result	Commentary
Purbeck Ice Cream	8	<p>Among the areas where Purbeck Ice Cream excels are business planning, leadership and management. The company was also noted for the continuous development of the team based on a culture of fun and encouragement. But perhaps the best illustration of the benefit of achieving Investors in People accreditation was when three new pieces of equipment were recently installed. "The production team were initially rather scared of the daunting task of operating the new machines," explains Hazel. "But they have since grasped the opportunity to learn, train and be responsible for the output. "Consequently team morale, effective and confident behaviour and smooth operations have resulted in vastly improved output with little or no disturbance." Hazel is glad that any initial fears among staff about going for Investors in People accreditation have been overcome: "The team initially saw the idea of travelling the journey to become Investors in People as a possible 'time-stealing' operation," says Hazel. "However as measures were updated 'by the team, for the benefit of the team', it ultimately led to better understanding of tasks and a clearer appreciation of what needs to be done to accomplish them. "They have seen their suggestions not only put into place but work effectively. As a result staff have recognised that definite improvements come from working together and it has boosted procedures, sales and morale!" "The individuals are proud to be recognised as members of the Purbeck Ice Cream team and as Investors in People," concludes Hazel. "They wear the badges, display the logo on our freshly liveried vans and are confident in the knowledge that with the ethos inspired from Investors in People the company will strive forward - onwards and upwards!"</p>	Benefits claimed are qualitative in nature.
R Brewer Construction	70	<ul style="list-style-type: none"> • Long-term employee turnover is consistently improving, with some employees having now been with R Brewer for over 15 years • Recruitment costs are down • Courses funded by the company now include HNC's, Modern Apprenticeships, First Aid qualifications and NVQs • The company continues to be awarded long-term contracts, and currently is working on contracts lasting 3, 4 and 5 years. • Margins have improved by 6% on gross profit and about 2% on net. 	Unclear how organisational benefits are attributable to IIP status.
Rabjohns Business and Tax Advisors	43	<p>Rabjohns met all the criteria of the Work-life Balance Model and was able to demonstrate to staff and management the value of its work-life balance policies. The Model enabled the organisation to measure results and assess the business benefits of each approach, while establishing a feedback mechanism for employees. Rabjohns' strategic approach to work-life balance is now one of its most effective recruitment and retention tools. Its approach is outlined in job advertisements and was discussed by applicants in recent interviews - for which Rabjohns felt it attracted a wider audience. Rabjohns adopted 'open door' policies before working with the Model. The difference now is that work-life balance is firmly engrained in our culture, making, in my view, a happier workforce who are themselves more prepared to be flexible to meet business needs" concludes Andrea.</p>	Claimed benefits are qualitative in nature.



Organisation	Size	Stated result	Commentary
Rawling and Sons Opticians	79	<p>Communications have improved enormously at Rawlings & Sons Opticians since the company first began working with the Investors in People Standard. There are now regular meetings between employers and managers and thanks to the new structures that have been created information moves freely up and down the company. As a result, the standard of customer care has increased significantly. Alan Steel comments, "We concentrate on providing excellent customer care rather than cut-price glasses. This means that our people are essential to our success. Investors in People has enabled us to focus more on our team and to develop them so that they are able to provide a much higher standard of customer care." "Information is now shared much more effectively. With this increased communication has come a better understanding among employees of management decisions. For our workforce this is probably the biggest single benefit. Other elements that have been implemented, such as appraisals, have all helped to increase the dialogue between management and employees." A crucial benefit of Investors in People has been the recognition that all employees are equally important in helping the business to provide a quality service. In the past, new initiatives were often seen by employees as something to be mistrusted. But, according to Alan Steel, the whole team got behind Investors in People from the outset because everyone understood that there would be benefits for all. Investors in People made us realise how valuable everybody is," he says. "Each member of the team has a vital role to play - whether we are talking about the technicians who glaze the lenses or the receptionist who is our public face. We have also improved all-round expertise which means that technicians and customer service staff can provide the public with information without having to refer to the senior opticians." Employees are said to be delighted to be more involved in the running of the business, including learning about the performance of a branch or what equipment is going to be bought and why. "Everyone is much happier now," says Alan Steel. "Our people have some excellent ideas and provide some very useful input. That simply wasn't happening before."</p>	<p>Benefits are qualitative and are not related to organisational outcomes.</p>
Rhythm of Life	13	<p>Rhythm of Life has an excellent reputation, placing it ahead of its competitors, and first in the customer's mind. They enjoy repeat business, and advertise themselves as the quality of their services is highly visible. Taking advantage of the free courses offered by manufacturers helps develop expertise at very little cost to the company. Sharing business objectives with staff and structuring their development to support these goals has produced more relevant, focussed and cost-effective training directly resulting in enhanced business performance and greater profits. Specific staff training development needs are identified and appraised on a regular basis, so staff feel motivated, are competent and enjoy variety in their work and progress in their careers. Staff are happy, feel valued and are rewarded which creates greater efficiency and effectiveness, improving profitability. Andrew's dynamism and great business understanding have ensured that Rhythm of Life is a profitable and successful business. Andrew's personal development has inspired staff and reduced costs reducing the need for additional support. "We have provided sound equipment and engineering staff for Brampton Live and the annual fireworks' display in Bitts Park, Carlisle, for several years now and we have recently been awarded the contract to produce and event manage the north's biggest event, the 2005 Whitehaven Maritime festival," says Andrew. "We do have competition but I like to think we are in a different league because our staff are so well-trained. I can't quantify how much we have spent on workforce development but we wouldn't be where we are today without it. I've got the right systems in place, a very happy team and a business with an excellent reputation."</p>	<p>Unclear how claimed benefits relate to IIP status.</p>



Organisation	Size	Stated result	Commentary
Richmond Ice Cream	350	<p>Being accredited as an Investor in People has had a major impact on the business and has led to increased customer satisfaction. Our customers recognise that Richmond is passionate about its products and the service it provides. The Investors in People Standard provides us with the focused framework and a benchmark which can be used on an on going basis to ensure we continue to meet the standards we are aiming for. Being accredited also means that our customers can be confident that we operate as a quality business. "The employees have bought into Investors in People wholesale," adds Peter Pickthall. "In fact, we look to provide an on going process of development for all our staff linked to both the needs of the business and their career aims. With some people this will focus on job competence, others will move onto degree programmes. People development in the business used to be ad hoc and took place only in quiet periods but it's now part of the everyday life of the business. Appraisal is linked to key performance indicators and training needs analysis and that feeds into the overall training plan." A significant change since embracing Investors in People includes a greater understanding among the workforce of the reasons for training. Employees now realise that gaining new skills benefits them too - both in terms of personal development and financial reward - and is not just a means of helping the company to grow. For many employees, says Peter, the sky is the limit when it comes to their professional development.</p>	<p>Claimed benefits are qualitative or have limited apparent linkage to organisational outcomes.</p>
Rivington and Blackrod High School	200	<p>"The experience of achieving Investors in People and our range of activity was also a significant factor in us becoming accredited by the Teacher Training Agency as a Training School in September 2003. Here, our best practice was disseminated among partner schools, we directly trained significantly more teachers and shared our expertise with other schools," says Jim. Staff morale has remained high over the past five years due mainly to the opportunities for CPD, equality of opportunity, professional satisfaction and the sense of being valued. "Working towards and gaining the Investors in People Standard coupled with us being awarded Training School Status has transformed the culture completely," adds Jim. "Staff retention figures and attendance of both staff and pupils has continuously improved. There has also been a notable improvement in the examination results and general class climate. There is increased credibility and prestige surrounding our people and the organisation. And we remain significantly oversubscribed by parents despite an expansion of our role to try to meet the demand for places." The quality and success of the training programme is also borne out in that senior posts are now increasingly sourced via internal promotions, particularly over the past two years. RBHS' Investors in People success has also benefited its partners. Ladybridge High School, a once failing partner school, has been successfully restarted on the basis of best practice and shared management; Mount St. Joseph's has implemented RBHS' restructured working week to facilitate CPD; Bolton LEA is modelling some of its leader programmes and is using it to advise on the establishment of a local leadership working group. "We need to provide opportunities out of school for our pupils to develop social skills as well as tradeable skills. We have been able to invest a lot of time and expertise in expanding youth provision in the local area and have captured significant grant money enabling us to re-energise local facilities," adds Jim. "The Investors in People approach increasingly matches the new Ofsted frameworks and is helpful because it forces us to continually think of the 'how' and not merely the 'what'."</p>	<p>Benefits relate to validation of training (revealing the roots of IIP).</p> <p>Benefits are predominantly qualitative.</p>



Organisation	Size	Stated result	Commentary
Rosenbluth International	5,000	Working with the Standard has also enabled Rosenbluth International to tighten its evaluation methods. The organisation was able to compare teams whose managers had participated in its leadership development programme with those who had not. The team retention figures, in an industry well known for employee churn, spoke for themselves. On average, there was only a 3% turnover in associates where their team leaders had completed the programme - as opposed to 12% in teams where leaders hadn't attended the programme. "Investors in People helped us to establish that our training has real bottom line benefits", says Steven Filby. "When you apply the often-quoted industry statistic that to replace an associate will cost 6 month's salary; then our leadership development programme saved us about \$1million. The outlay for the programme was only a fraction of that - so it has been a great investment. And that's a great way of selling people development to directors. It gives it real credibility."	Unclear how this relates to IIP status as opposed to a leadership development programme.
Sarisbury Infant School	40	<ul style="list-style-type: none"> • Endorsement of good quality work already going on • Gave a boost to everyone's self-esteem • It pulled up the quality of our work throughout the School • Individuals recognised that they each make a valued contribution and that impacts on high quality teaching for learning • Importantly pupils have benefited from our highly motivated staff team. 	Qualitative benefits with unclear attribution to IIP status.
Shepherd Construction	1,400	Investors in People was influential in the introduction of several developments, including: <ul style="list-style-type: none"> • more effective induction training • more direct links between the training and business plans • identification of individual training needs • improved communication procedures • new operative training standards • extended management training programmes. They have also achieved two training awards: <ul style="list-style-type: none"> • quality in construction; training award 1997 • a special award for lifetime learning 1996, Durham TEC. 	Unclear how claimed benefits are to be attributed to IIP status given a broader programme of 'Total Excellence'.
Shuttleworth Veterinary Group	18	"Everyone benefits from having a good balance between the workplace and home. Our employees have more flexibility and job satisfaction, we benefit from a more productive workforce and our customers get a welcoming and attentive service," concluded Sue Shuttleworth	Benefits are qualitative and rely on an individual perception.
Skipton Building Society	1,053	"Investors in People has provided an external standard against which the society could measure itself. "	Benefits are qualitative and rely on an individual perception, with no apparent linkage to organisational outcomes.
Skipton Building Society	1,053	Linda Grant from Skipton Building Society commented: "The Model has given us a focus in terms of how to move things forward in the future. It is easy for the HR and Personnel departments to work in isolation, imposing training and initiatives that feel removed from everyday working life to staff and consequently do not have a lasting effect on performance. The main benefit we found was that the Model gave us an opportunity to benchmark the management training and development against an independent standard. We are so delighted with the Leadership and Management Model we have asked to be the first organisation to sign up for the full Model once it is launched. "	Benefits are qualitative and rely on an individual perception.



Organisation	Size	Stated result	Commentary
Socit Plant Ltd	5	Socit achieved the Investors in People Standard for the first time in September 2004 but has been working towards the Standard over the past five months. All the indications are good however with turnover up on last year's figures and productivity assessed as increasing by 15% each month. The company's profit will be measured at the end of the year with comparisons and statistics indicating how successful it has been increasing the skills of the team.	Unclear how financial benefits are attributable to IIP status.
South African Breweries (Newlands plant)	400	Says Boesenberg: "The Standard has enabled us to focus on and critically review our people management and development processes." Rob van der Schyff, HR Development Manager for SAB Limited agrees. "The Investors in People Standard has great value as it raises the bar in respect of sound people management. Good communication is encouraged, thus enhancing leadership and business results." However, while the people at Newlands Brewery are very pleased to have been awarded Investors in People accreditation at first attempt, they do not consider themselves as "having arrived". "We remain committed to living our value of continually improving in the critical area of people management and development," says Boesenberg.	Unclear how qualitative benefits relate to organisational outcomes.
South Farnham School	50	Regular whole staff and team meetings are planned for one year ahead with agendas made available to all so that those who want to contribute can do so. The school has become a City & Guilds training centre and this offers the opportunity for classroom assistants to gain NVQs. Classroom assistants are supported towards formal teaching qualifications and ten teachers have been awarded Qualified Teacher Status through the Graduate Teacher Programme using the training plan devised and administered through the school. The staff all contribute to writing the school improvement plan and provide their own area's fully costed action plans. Financial awareness has been boosted and control of costs has improved. The school's performance has allowed for £1m to have been spent on buildings from the school budget, with further plans now in train to extend the building and link classrooms. The regular survey of all staff encourages innovation and creativity - staff are asked for their "ideal world" suggestions for improvements. While staff retention is good, there is a healthy turnover of staff as people are developed, promoted and, indeed, encouraged to move on for career development. Out-of-school activities have also benefited, and closer partnerships with parents help with fundraising, but more importantly, to share their experiences and expertise in the "Bright Futures" programme which the school has developed to promote an understanding in children of the relationship between their education and their future roles in the workplace. South Farnham School was recently voted "Primary School of the Year" in the Sunday Times. It is a "Beacon School" and for four years has been sharing best practice with over 100 other schools. The school also has a number of curriculum awards for its use of ICT, in sports, the arts and basic skills. In its 2003 OfSTED inspection it achieved the rare accolade of being rated as "superb" by HM Inspectorate.	Unclear how various recognitions and financial outcomes relate to IIP status. Benefits claimed are predominantly qualitative, with unclear linkage to organisational performance.
Springfarm Architectural Mouldings	87	Turnover has increased by 250%, employees by 300% and profits by 185% in the six years since the first Investor in People recognition. Investors in People has been the foundation for the success enjoyed since first committing to it in 1996. Skills improvement for operatives has increased by 270% over the last 6 years and turnover per employee is up 20%. The Investors in People assessor noted comments from employees as follows: "We're happy knowing what's going on...what our targets are." "Customer driven...if someone wants something different we have to find a way to do it." "It's good to know someone has confidence in you." "I love it...I can see things happening...results." "It's well run like...brilliant." "I wouldn't change this job for the world." "Continuous improvement in all that we do." "Quality systems at the heart of everything." "Everyone works well together."	Unclear how organisational growth can be attributed to IIP status.



Organisation	Size	Stated result	Commentary
St Mary Magdalene Primary School	34	St Mary Magdalene is now rated as "one of the most improved schools in Sandwell". The school is viable, is adding value, and standards and results are improving continuously. It has innovated to provide a range of new services which benefit parents and children alike. Before and after-school clubs operate each day: parents benefit from the mix of childcare and education, and the children benefit from the social stimulation and learning which this provides. The school strongly supports "family learning" and parents are introduced to curriculum activities and the school's passion for learning through, for example, ICT Clubs. This widens horizons and has led to more parental interest in subjects. This, in turn, has led to further education and enhanced job prospects for parents taking a second bite at education. The school's staff now feel valued, they meet regularly, communicate effectively and learn from each other, and derive good practice ideas from "learning walks" at other schools. Everyone benefits from continuous professional development and the school takes pride in mentoring and developing its newly-qualified appointees. Staff losses now tend to be for positive reasons such as promotions and new appointments. Non-teaching staff are empowered and developed as trainers in their own disciplines. The "customers" have their say, too. Year 5 children act as "ambassadors" for the school, Year 4 children take part in pupil conferences and all complete a pupil attitude survey. Past pupils have also added voluntarily to the positive evaluation of the school's work. The school has achieved Gold Standard in the Healthy Schools Initiative, which embraces personal and social factors for pupils and staff alike, and is now aiming for the Platinum Award.	Claimed benefits are qualitative with unclear attribution to IIP status.
St Marys Girls College	90	St Mary's College has been astoundingly successful since its work on Investors in People and quality models bore fruit. It was the first European educational establishment to win the prestigious European Quality Award and has also won the UK Business Excellence Award. The public service "Charter Mark" has been achieved four times. The school has won two National Training Awards and two Regional Training Awards for examples of exceptionally effective training. Several individual staff members have won national teaching awards. The school has benefited greatly in many ways. GCSE examination performance results have doubled over ten years. The school is cost-effective, provides best value and has stayed within budget. Staff turnover and absence are well below sector averages. There have been numerous development successes which have resulted in internal promotions to senior positions and, for example, technical/clerical support staff achieving qualified teacher status. Parents are a valued part of the school community. Many have been trained to assist teachers and this has raised horizons, leading to further education, training and job opportunities for the parents themselves - exemplary practice which has since been adopted in other schools.	Claimed benefits are predominantly qualitative with unclear attribution to IIP status.
Strathclyde Police	9,500	"Strathclyde Police believes that the Standard adds a sign of value and provides an indication of commitment to the current workforce"	Claimed benefits are qualitative only.
Swiss Cottage School	70	Swiss Cottage School has been a Beacon School since 2000. Under this scheme it shares its expertise with other schools in areas such as leadership, management, pupil behaviour, special educational needs and professional development. Two Ofsted inspections have rated the school as "extremely successful", "achieving excellence" and this merited inclusion, in each instance, in HM Chief Inspector's "Most Successful Schools" list. The School manages pupil behaviour problems effectively. It has won numerous curriculum awards in areas as diverse as ICT, sports and the arts. Its culture and reputation have led to reduced staff turnover and absence with no shortage of applicants on the rare occasions when vacancies arise. Staff don't want to leave and they have opportunities to develop within the school, using amongst other things the coaching and mentoring structures in place. There are several examples of the school's teaching assistants going on to become qualified teachers.	Claimed benefits are predominantly qualitative, with limited or unclear attribution to IIP status.



Organisation	Size	Stated result	Commentary
T Manners & Sons	50	The company's plan amounts to a total of 273 training days - an average of almost 6 training days per employee. The aim is that the entire workforce will be registered under the Construction Skills Certification Scheme (CSCS) by the end of 2002. But Alan is confident that the cost of the training will be more than offset by increased output and profits. "It's easy to take the moral high ground about training, but the bottom line is that we are doing it to improve the efficiency and profitability of the company," he says. They have formed an Employee Representative Committee, which provides a forum for all members of the workforce to discuss and be part of the business planning process. They are also introducing a uniform for operatives as a way of addressing the poor image that the industry has acquired. Robert and Alan found the Build a Better Business workshops invaluable. "Working in a cross-sectoral group that represents manufacturing, opticians, accountants, and a medical practice in order to achieve the Investors in People Standard has been an interesting experience," says Alan. "If the group had only been made up of construction companies, then we might have been more reluctant to talk about our problems. As it is, we began to realise that we are not doing so badly, after all! Every business, whatever its sector, has problems with employees, with skills shortages and with implementing change. We all shared best practice in terms of what worked for us, and what didn't, and it is proving to be a really good way of learning." "The industry needs to make some radical changes and move away from some of the archaic, deep-rooted traditions for which it is renowned," Alan concludes. "We believe that Investors in People will improve working conditions within the industry. It is certainly showing us the way forward, and we are determined that, with the help of Business Link and the CITB, we will achieve it."	Unclear what organisational benefits are claimed on behalf of IiP status.
Tarmac National Contracting (Southern Region)	125	Although the company has achieved the Standard, Rod and his senior managers recognise that they need to continually use the tools if they are to achieve their goals and build a stable team of people who recognise the value the company places in them. "There's a lot of work to be done but the practices we are putting in place should give us a team of people who understand the importance of their role in the company and who know that their contribution is fully valued", concludes Emma. "You always need people in this business and making sure we keep the right people with us is the challenge we face in the next few years. I'm looking forward to seeing how far we have progressed at our next assessment in three years time."	Unclear what organisational benefits are claimed on behalf of IiP status.
Thames Water Services	400	Measured in terms of revenue collected, the billing and collection unit that Thames Water runs is the most effective that Dwr Cymru has ever had and one of the best in the industry. In the Debt Audit of the accuracy and robustness of our collections processes carried out by Watervoice, who represent water customers in England and Wales, Thames Water's operation in Wales is the only company ever to have achieved 100% and it has now done so two years in a row. And staff turnover, which for a call centre unit can run as high as 35-40% is only around 10% at the Cardiff operation. And mystery shopper exercises that Dwr Cymru conducts regularly to check that customers are being properly dealt with consistently reveal a very high standard of service. "You can measure our success any number of ways", concludes Huw. "But whatever the measure, the people who work here consistently provide a high standard of customer service, which I believe reveals the fact that they feel valued by the company."	Unclear how stated benefits are attributable to IiP status.
The Beaufort Park Hotel	100	The Beaufort Park Hotel has achieved an increase in turnover every year since it was acquired by the Best Northern Hotels Group. Profitability has increased by 400% in the same time period. The Beaufort Park Hotel won the Daily Post's 'Achievement Wales Employer of the Year Award' in 2001. Due to the success of the Beaufort Park, the Best Northern hotels group has decided to implement Investors in People in its 2 other hotels.	Unclear how financial benefits are attributable to IiP status.



Organisation	Size	Stated result	Commentary
The Belmore Court Motel	12	The company's focus on people and its approach to training and development is certainly paying dividends explains Terry, "by encouraging and supporting staff to take ownership and responsibility for their jobs we have developed a team with a new confidence. Indeed, by adopting the policy of cross-training staff in a range of job roles we have increased flexibility within the Motel and given individuals the opportunity for personal development in other areas like 'IT'. The bottom line is that in this business people work with one another for one another and the Motel is dependant on no one individual, including myself, and that's a breath of fresh air!"	Benefits are qualitative only, based on individual perception.
The College of Chinese Physical Culture	28	In the past, all the work involved in organising and running the CPC courses was carried out on a voluntary basis but since March 2000, the College has had sufficient funding to pay 12 of its 50 or so teachers, as well as another two employees. This increased to 28 employees in 2003. Recognised as a National Governing Body by the Central Council for Physical Recreation (CCPR), the College helps employees to develop leadership skills and train to be professional coaches. The College has recently created a trading company, called Smart Fit, which delivers the benefits of CPC to staff in the workplace. It has so far worked with over 50 companies and public sector employers to tackle issues such as stress management, team-working, communication skills, and culture change. Clive Nunnington adds: "Investors in People has definitely helped us in terms of employing people, especially in identifying their training needs and implementing a formal appraisal structure. All the benefits we've seen - from team-working to funding -have come about as a result of working with the Standard."	Benefits are qualitative only, based on individual perception.
The Conway Centre	58	The Centre has increased its number of 'bed nights' per year from 38,000 to 50,000. <ul style="list-style-type: none"> • Original plans to close the Centre have been shelved and an additional 30 year lease is now being negotiated with The National Trust. • The Centre will be completely self-financing by 2003. • A poll of schools in Cheshire, asking whether they intend to use the Centre in the next 12 months, resulted in a 98% positive response. • The Centre has move from a loss-making position, to one where it was able to subsidise the losses of other Centres, who were badly affected by cancellations caused by Foot & Mouth restrictions. 	Unclear how organisational benefits are attributable to IIP status.
The Co-operative Group	70,000	The Co-operative Group has adopted the Investors in People Standard region by region, so that today it covers 70,000 people nationwide across a range of industries. The lead assessor, Alastair Wheeler, said, 'The Group has continued to deal with major change, including several acquisitions, changes in senior personnel, and re-structuring. Use of the Standard has aided this process, by focusing on strategic planning, good communications, and extensive talent-spotting activity to fill the many vacancies, which have arisen. 'Performance management has continued to evolve, and development of leadership and management skills has remained a priority. The new version of the Standard and the Profile model will mean significant stretch to the Group's activity to meet all the evidence requirements.'	Benefits are qualitative only, based on individual perception (unclear whether this is from an external viewpoint).
The Eresby School	24	The Investors process had a huge impact: <ul style="list-style-type: none"> • Better deal for pupils from more positive staff • Staff have been shown that they are all valued and that they all make a contribution, which has raised their morale • We have been able to focus the impact of training courses back into the classes and measure the outcomes • It has helped towards meeting the issues in our action plan for OFSTED and gives evidence of improvement for the LEA review 	Benefits claimed are qualitative in nature.



Organisation	Size	Stated result	Commentary
The Glass Scribe International Ltd	10	"Investors in People inspired us to communicate more effectively and this has really helped. Our weekly meetings are very productive and each staff member contributes ideas to the development of the company. Because we are all more flexible we can implement good ideas quickly and benefit from them immediately." "Each employee has their own job matrix which plots their development route, encompassing areas where they are already strong and points that require extra effort or training. " "The job matrix is a product of the Investors in People work and it directs everything we all do," says Simon Fletcher. "People do not all progress at the same rate but most excel in a number of areas so we can see progression and improvement, which is reflected in their performance. "Investors in People has brought us recognition within our sector and in the region as a quality company with quality people. That's something very worthwhile"	Benefits claimed are qualitative in nature. Case study suggests that recognition is the most valuable outcome.
The Glenmorangie Company	350	Since originally achieving the Standard the company has seen a year-on-year increase in turnover and profits and an increase in employee satisfaction. We have taken part in the Sunday Times Top 100 Companies to Work for Survey and have progressively improved, achieving 78th in UK in 2002, 42nd in 2003 and 30th in 2004. However we were not eligible to enter in 2005 due to the change of ownership in the company. Having good communication and management practices has helped us to cope with the uncertainty of change - and even although we have made several redundancies this year we were heartened to hear our employees are still very loyal and believe strongly in the company.	Unclear how IiP status has led to other forms of recognition or financial growth.
The Grantham Church Voluntary Aided High School	60	<ul style="list-style-type: none"> • Good practice has helped improve standards • Benefits from happier staff • Exam results have quantified the improvement: School Achievement award 2001, 2002 and 2003; Basic Skills Award 2002 and the Sports Mark. • They all feel more valued and know what is going on • Line and curriculum management have become more organised • They share good practice which has helped staff • Performance management now includes all staff • The school had a successful review and was awarded re-recognition status in May 2004. OFSTED recognised that much of their practice was as a result of Investors (OFSTED inspection in May 2001 came before the achievement of Investors in June 2001) • The Head and Chair of Governors took part in Investors video • Links with the local community improved 	Claimed benefits are predominantly qualitative, with limited or unclear attribution to IiP status.
The JSR Farming Group	160	ISO 9002 was achieved by all three businesses in the group. The mission plan of each constituent company in the group was presented at a roadshow. Historically moderate production figures have been transformed into good results which have achieved a return-on-capital growth in excess of 10%. Attention to detail by staff members as a result of training has led to an increase in production across all aspects of crop and livestock businesses. There has also been an increase in marketing margins as a direct effect of improved quality. The development and use of other skills, such as building and joinery during quiet periods, have saved more than £40,000 since 1991. A National Training Award was received for this 'Arable Builders' initiative in 1994. An Innovation Award was introduced in 1992, and in still in 2004 entries are received from around the company. Project teams have been formed as a vehicle for problem-solving and continuous improvement. Monthly management meetings, noticeboards and an increasing use of information technology methods are important elements of the company's channels of communication. Several staff members are working towards NVQs at levels 1, 2 and 3; all livestock managers are trained internal assessors.	Unclear how claimed benefits relate to IiP.



Organisation	Size	Stated result	Commentary
The Lewis Partnership	240	Using the Standard has revolutionised the business and its people, bringing consistency and quality. Despite its growth, the business prides itself on keeping a focus on each individual and their needs and circumstances. New core teams are in place and their leaders have become their mentors: they are contributing well in all locations and departments. They have provided the confidence to enable the business to grow and invest sums well in excess of £1m. Retention of staff in an industry known for high levels of turnover has been greatly improved. Staff freely contribute ideas and there are "Above and Beyond" awards for individual employee excellence. Turnover has risen by over 400% in five years. Occupancy has continued to improve and currently runs at 85%. Well prepared staff have an eye to costs, and running costs have been reduced. In 2003 the business was a Midlands Business Excellence Award winner. It was voted "Hotel of the Year" by the Heart of England Tourist Board alongside an impressive list of awards for its sector. Individual staff members have been highly placed in sector awards too.	Claimed benefits are predominantly qualitative, with limited or unclear attribution to IiP status of financial outcomes.
The Prince and Princess of Wales Hospice	100	The hospice has found enormous benefit in working with the Investors in People framework. We have implemented systems such as performance reviews, coaching and job shadowing. We now have a training and development committee that ensures all our departments are working together. All these things have assisted in ensuring that the hospice now works smarter.	Benefits are qualitative and relate to the introduction of 'baseline' processes.
The Society of Operations Engineers	21	Mark Organ concludes, "Investors in People was a really rewarding experience in so many ways. Becoming an Investor in People is a great achievement in itself, but the fact we have seen such positive changes throughout every aspect of the SOE is probably the most satisfying part. It is great to work for such a committed and motivated organisation. The Standard has changed our whole working culture for the better. There is no doubt this is a friendlier, happier and more effective environment to work in."	Benefits are qualitative and relate to an individual perspective, with limited linkage to organisational outcomes.
Thomson Directories Ltd	1,000	The Investors in People Standard is now a core part of Thomson Directories' business. The company constantly benchmarks itself against it to ensure quality and improvement. An Investors in People trophy is presented each year to the manager who can demonstrate excellence in people development, alongside achievements such as low staff turnover and high morale. "Investors in People is now an effective means of benchmarking the performance of the whole organisation against a range of measurements including leadership and work life balance," says Sinead. "We look at a range of Key Performance Indicators (KPIs) such as staff morale, staff views on training and development, number of training days delivered, staff turnover and so on. The aim is to determine the effectiveness of our people strategies." Further external recognition for Thomson Directories came in 2005 when, at its first attempt to qualify, the company became a 'Sunday Times 100 Best Companies to work for' and repeated this again in 2006. The company was also a finalist in the motivation category of the Employee Benefits Awards in 2005, testimony to the importance Thomson Directories has placed on engaging with its employees. "It is all about making this a great place to work," adds Sinead. Each summer, Thomson Directories surveys its employees asking whether, among other things, they believe senior management is supporting the values. The results have improved year-on-year to their current level of 85 per cent. In 2005, 78 per cent of employees said their department also lived by the corporate values. Thomson Directories' commitment to the Standard and to encouraging other organisations to adopt its principles meant that the business was awarded prestigious Champion status in 2005.	Unclear how IiP status links to Thomson KPIs or enhanced survey results. Linkage between IiP status and Sunday Times 100 status is not clear.



Organisation	Size	Stated result	Commentary
TNT UK Ltd	10,000	TNT UK Ltd has used Investors in People alongside the EFQM Business Excellence Model which led to the European Quality Award being achieved in 1998. The company feels that Investors in People contributed greatly to the "people" and "results" criteria of the EFQM Model. The company is on record as saying that Investors in People helped them to double turnover and profits within a five-year period. Incremental improvements continue to be seen across all of the company's people development processes: improving staff attitude survey results from across the network bear this out. Internal academies and support for development help TNT's people to progress in driver training, sales, operations, supervisory and management roles. The company firmly believes in developing its own "home grown timber", and promotions from within up to general management level have been achieved. Creative ways of learning such as inter-depot quizzes have been introduced as "fun with a purpose". The company's intranet keeps its diverse network up to speed with what's going on as well as providing resources for learning. In addition to its Investors in People and European Quality Awards achievements, TNT has also won The Queen's Award for Enterprise in 2000, five National Training Awards and numerous other quality and sector awards.	Unclear how benefits are to be attributed to IiP status given the broader programme of EFQM.
Torquay Leisure Hotels	316	<ul style="list-style-type: none"> • turnover up by 17% • profitability up by 25% • improved room occupancy rates - 20% above national average and growing • high level of repeat business and personal recommendation • staff retention improved by 30% • recruitment costs down by 60% • guest comment cards show 98.5% customer satisfaction levels • purchase of fourth hotel reflecting success in time of recession • 40 managers are now able to design and deliver training packages • the group was recently awarded a National Training Award • the company has been used as a case study of good practice in the 1993 ILAM Guide to Good Practice and in a BBC training video on learning organisations. 	Unclear how claimed quantified benefits are attributable to IiP status.
University of Teesside	1,701	By working as a single entity, the University of Teesside has adopted a more consistent and focused approach to staff development that is in line with the business needs of the organisation. "We now come together for common areas such as IT training or conflict management," says Alan Jackson. "Not only is this a more effective use of resources, it allows cross-fertilisation between departments." Staff communication has also improved according to Jan Anderson. "It's good to feel listened to," she states. "The systems we have here means you don't have to push hard to make yourself heard." And for Beverly Hadfield, Assistant Director of Staff Development, the benefits of Investors in People are clear. "We see it as framework of best practice in people development which ultimately makes things better for everyone who works here by providing the support people need to do their jobs effectively and develop as individuals. It applies to our manual and administrative staff and technicians just as much as it does to our academic staff." She is also convinced that being able to demonstrate its commitment to people development has boosted the University's success in recruiting new staff. "There is evidence from new staff that they were attracted to our University because it has Investors in People recognition," she concludes. "They tell us it reassures them to know they will be trained and supported."	Claimed benefits are qualitative with limited linkage to the University's organisational KPIs or outcomes.



Organisation	Size	Stated result	Commentary
University of Wollongong Library	1,600	"As a result the Library can report that it has definitely received value for its investment in both the Australian Business Excellence Framework and Investors in People. Receiving recognition against an international best practice standard was a significant affirmation that the investment made in developing a culture that fosters continuous learning and readiness for change had been realised."	Claimed benefits are qualitative only.
Wealden District Council	550	<ul style="list-style-type: none"> the employment of quality staff who are trained to reach their full potential smoothly introduced changes in financial systems in-house bids for work put out to Compulsory Competitive Tendering have been largely successful sickness absence below the national average for local government for 2004-2005 the provision of a complaints procedure that offers members of the public, shareholders etc the opportunity to articulate any concerns they may have about the Council's service close links with schools including annual work placements for students provision of voluntary advisers on school projects teaching primary school children how to react to dangerous situations such as road and rail safety, fires, accidents and dealing with strangers in-house and external seminars on healthy eating and the dangers of smoking an environment in which ideas and innovations are encouraged opportunities to develop towards nationally recognised qualifications, including training in areas (e.g. languages) not directly related to their jobs, and help in fulfilling individual ambitions 	<p>Unclear how quantified or organisational measures (e.g. absence, in-house bids) are attributable to IIP status.</p> <p>Majority of benefits are qualitative.</p>
Wellingborough Council	450	"We've noticed a real shift in our culture. The hours people work no longer matter as much as what gets done. We're helping our staff to manage their time efficiently. In this way, our employees and the organisation reap the benefits of a good work-life balance," continued Mike Scott. The Model has been welcomed by employees as it has made their lives both at work and at home easier to manage. "Staff are happier at work, are more in control of their time and the job in hand and have a better lifestyle. They also have more flexibility, which means they are less likely to take sick leave or be absent from work. As an organisation, we benefit from higher staff retention and a more productive workforce," Mike Scott concluded.	Claimed benefits are qualitative and based on individual perception.
Wigan and Leigh College	1,284	One of the most notable requirements that came out of the Model was the need for a Management Charter that would for the first time define some aspects of what was expected from managers and their role in the organisation. One of the most encouraging findings was how positive and committed people are to the organisation. All those interviewed are keen to improve, however, with no formal development structure and no definition of what they should be aiming for they have been working in a vacuum. The Charter is the first step in addressing this problem."	Benefits relate to the establishment of 'baseline' process introduction.

In addition to the case studies published on the Investors in People website, a recent publication by IDS HR Studies sets out six expanded case studies¹⁸. These are included below and reviewed in a similar way, given their relevance to this exercise. Of the six case study organisations, Buro Happold, Defra and Komatsu UK are included within the website case studies reviewed above. As these case studies do not include a specific 'results' section, they have been reviewed and quoted verbatim wherever possible.

This review shows that no case study puts forward quantified benefits from IiP status, instead identifying qualitative, anecdotal outcomes or outcomes that relate to PR, external acknowledgement or access to public sector tendering processes.

Organisation	Size	Stated result	Commentary
Buro Happold	750 in UK	"The company uses IiP primarily as a business improvement tool – the assessors' reports provide reassurance that it is following best practice in terms of its people management and development strategies, while identifying any areas that might be in need of development. Having IiP status also serves the company's commercial interests. Many of its potential clients, particularly organisations in the public sector, now only take their custom to organisations with IiP recognition."	The comment around public sector preferences in contract tendering calls into question the organisation's expectation of intrinsic benefits from IiP.
Defra	6,500	"Although the department initially applied for IiP recognition to meet its obligations set out by the government, the award has since become highly-valued internally. Defra attaches great importance to the assessors' report, particularly welcoming its comprehensive coverage and objective viewpoint. According to Defra's IiP strategy manager, the IiP standard has served to: <ul style="list-style-type: none"> • Define and publicise the key elements of good people management practices, particularly relating to learning and development for employees at all levels • Encourage all areas of the department to work towards such good practice • Support areas of the department undergoing radical structural and role change • Recognise and reward the achievement of good practice and to motivate and encourage any areas struggling to meet or maintain the IiP standard • Identify Defra across Whitehall as an effective and forward-looking department. 	Benefits are qualitative, based on individual perspective. The comment relating to the initial justification for IiP status is revealing.
Komatsu UK	745	<ul style="list-style-type: none"> • Using the IiP assessors' reports to provide an objective insight into areas in need of improvement • In response to the 2005 review, the company designed and implemented a revamped performance and development review system 	Claimed benefit is an internal measure not linked to business outcomes.
McDonald's	45,000	"McDonalds views the IiP assessment as a great benchmarking tool, allowing it to gain a fresh objective report on its performance and of how it compares to its British competitors. It also serves as a very public recognition of the value the company places on its staff."	Unclear how the assessment is applied as a benchmarking tool, particularly in the context of British competitors.
Prudential UK	7,000	<ul style="list-style-type: none"> • Instigation of development workshops for managers • Establishment of an on-line 'learning management' system 	Claimed benefits are internal measures not linked to business outcomes.
Yell UK	3,600	<ul style="list-style-type: none"> • Regular assessment to help identify strengths and areas for further improvement • Alignment of learning and development best practice with organisational needs • Differentiation of Yell as an excellent company to work for and identifying it as a role model for others to aspire to • Acknowledgement of Yell's approach to people management, development and involvement 	Benefits relate to external recognition rather than quantified business outcomes.

¹⁸ IDS HR Study 816, February 2006

The Standard – a flawed construct

The Investors in People Standard was initially intended to provide organisations with an audit-type assessment against training 'best practice', seemingly with the intent of encouraging UK organisations to link their training approaches with organisational requirements.

As an illustration of the process-type assessment that this entailed, three of the original indicators are shown below. The wording of these indicators lends itself well to 'tick-box' assessment, on the basis of evidence or documentation provided.

1994 Investors in People indicators (extract)

Indicator 8	A written plan identifies the resources that will be used to meet training and development needs
Indicator 9	Responsibility for training and developing employees is clearly defined and understood throughout the organisation, starting at the top
Indicator 10	Objectives are set for training and development actions at the organisation, team and individual level

The weakness of this approach, however, is that the 23 indicators test more the existence of a set of processes, rather than the effect of their implementation. This gave rise to widely documented concerns that the assessment was essentially bureaucratic in nature and of potentially limited relevance to smaller employers.

Following decline in take-up in the mid-1990s, the Standard was radically revised in 2000, with a reduction in indicators from 23 specific, training related criteria, to 12. This revision led to a complete rewording of the indicators and an apparent shift in focus in the positioning of the Standard as a broader, organisational-development tool.

Our research has not succeeded in identifying any research or published information on why the 12 indicators were revised in this way: whereas it is a matter of public record that the original Standard's 23 indicators were based on research conducted in the 1980s into the training attributes of 74 of the UK's leading organisations (itself potentially of limited relevance a decade later), no such study appears to underpin the first or second revision to the Investors in People Standard.

This casts serious doubt on whether the current set of 10 indicators therefore have any link to business performance, or represent something of an aspirational view of how organisations ought to operate. If the latter is true, this suggests that a Government-backed organisation is responsible for imposing its own requirements on how private sector organisations should be operating: a concept that sits uncomfortably within an apparently market-led economy.

Review of the current set of 10 indicators (which form the basis for the Investors in People Profile tool) is set out overleaf, with their accompanying evidence requirements (in line with requirements at the basic Standard or Profile Level 1).

Against each requirement, definitional issues have been identified, with further commentary relating to the application/relevance of each indicator added.

These raise serious questions around the commercial relevance of the assumptions underlying the framework, and the qualitative nature of any assessment.



Ref.	Indicators (2004 version)	Evidence requirements	Definitional issues	Application/relevance
1	A strategy for improving the performance of the organisation is clearly defined and understood	<ul style="list-style-type: none"> Top managers make sure the organisation has a clear purpose and vision supported by a strategy for improving its performance. 	Definitions of 'make sure', 'clear purpose', 'vision' and 'strategy' are unclear.	<p>Unclear what organisational level is under review: e.g. business unit, country, group-level?</p> <p>Assumes a specific approach towards employee involvement in business planning that may not be adopted within all organisations.</p> <p>How many teams are there in the organisation and at what point is this deemed to be effective?</p>
		<ul style="list-style-type: none"> Top managers make sure the organisation has a business plan with measureable performance objectives. 	Definitions of 'make sure', 'business plan' and 'measurable' are unclear.	
		<ul style="list-style-type: none"> 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. 	Definitions of 'representative group', 'constructive relationships' 'business plan', 'teams' are unclear.	
		<ul style="list-style-type: none"> Managers can describe how they involve people when developing the organisation's business plan and when agreeing team and individual objectives. 	Definition of 'involve', 'business plan', 'team' and 'objectives' are unclear.	
		<ul style="list-style-type: none"> 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 	Definitions of 'representative group', 'constructive relationships' 'business plan', 'teams' are unclear.	
		<ul style="list-style-type: none"> 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 	Definitions of 'objectives', 'team', 'contribute' and 'developing' are unclear.	
2	Learning and development is planned to achieve the organisation's objectives	<ul style="list-style-type: none"> 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. 	Definitions of 'organisation', 'learning and development needs', 'plans', 'objective', 'impact' are unclear.	<p>Focus on learning and development reveals the Standard's basis in this area and raises questions around the 'balance' within the Standard and its application as a business improvement or organisational development tool.</p> <p>No differentiation between threshold competency development, skills training and developmental activity.</p>
		<ul style="list-style-type: none"> 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. 	Definitions of 'learning and development needs', 'plans', 'objective', 'impact' are unclear.	
		<ul style="list-style-type: none"> People can describe how they are involved in identifying their learning and development needs and the activities needed to meet them. 	Definitions of 'involved', 'learning and development needs' are unclear.	
		<ul style="list-style-type: none"> People can explain what their learning and development activities should achieve for them, their team and organisation. 	Definitions of 'involved', 'learning and development needs' are unclear.	



Ref.	Indicators (2004 version)	Evidence requirements	Definitional issues	Application/relevance
3	Strategies for managing people are designed to promote equality of opportunity in the development of the organisation's people	<ul style="list-style-type: none"> 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. Top managers recognize 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. 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. People believe managers are genuinely committed to making sure that 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. People can give examples of how they have been encouraged to contribute ideas to improve their own and other people's performance 	<p>Definitions of 'strategies', 'in place', 'environment', 'encouraged' and 'contribute' are unclear.</p> <p>Definitions of 'needs', 'strategies in place', 'appropriate', 'fair', 'support', 'equality of opportunity', 'learn and develop' are unclear.</p> <p>Definitions of "recognise", 'needs', 'make sure', 'appropriate', 'fair', 'support', 'equality of opportunity', 'learn and develop' are unclear.</p> <p>Definitions of 'people', 'believe', 'genuinely committed', 'making sure', 'appropriate', 'fair', 'equality of opportunity', 'learn and develop' are unclear.</p> <p>Definitions of 'encouraged', 'contribute' are unclear.</p>	<p>Does not acknowledge commercial tradeoffs in the provision of training (e.g. time off required, focus on high performers) and assumes that learning and development on its own leads to performance improvement.</p> <p>Assumes that it is appropriate for people to provide input on the performance of other people.</p>
4	The capabilities managers need to lead, manage and develop are clearly defined and understood	<ul style="list-style-type: none"> 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. Managers can describe the knowledge, skills and behaviours they need to lead, manage and develop people effectively. People can describe what their managers should be doing to lead, manage and develop them effectively 	<p>Definitions of 'knowledge, skills and behaviours', 'lead, manage', 'effectively', 'in place', 'make sure' are unclear.</p> <p>Definitions of 'knowledge, skills and behaviours', 'lead, manage', 'effectively' are unclear.</p> <p>Definitions of 'should be doing', 'lead, manage' and 'effectively' are unclear.</p>	<p>Evidence does not account for any differential between individual employee perspective relative to organisational requirements – these may not align in practice.</p> <p>Definitionally the breadth raises questions around how people respond.</p>



Ref.	Indicators (2004 version)	Evidence requirements	Definitional issues	Application/relevance
5	Managers are effective in leading, managing and developing people	<ul style="list-style-type: none"> Managers can explain how they are effective in leading, managing and developing people. 	Definition of 'effective' is unclear.	<p>Evidence does not account for any differential between individual employee perspective relative to organisational requirements – these may not align in practice.</p> <p>Definitionally the breadth raises questions around how people respond.</p>
		<ul style="list-style-type: none"> Managers can give examples of how they give people constructive feedback on their performance regularly and when appropriate. 	Definitions of 'constructive', 'feedback', 'regularly' and 'appropriate' are unclear.	
		<ul style="list-style-type: none"> People can explain how their managers are effective in leading, managing and developing them 	Definition of 'effective' is unclear.	
		<ul style="list-style-type: none"> People can give examples of how they receive constructive feedback on their performance regularly and when appropriate 	Definitions of 'receive', 'constructive', 'feedback', 'regularly' and 'appropriate' are unclear.	
6	People's contribution to the organisation is recognised and valued	<ul style="list-style-type: none"> Managers can give examples of how they recognise and value people's individual contribution to the organisation. 	Definitions of 'recognise', 'value' and 'contribution' are unclear.	<p>Assumptive around the operating model of a given organisation and people's contribution within this.</p>
		<ul style="list-style-type: none"> People can describe how they contribute to the organisation and believe they make a positive difference to its performance 	Definitions of 'contribute', 'believe', and 'positive difference' are unclear.	
		<ul style="list-style-type: none"> People can describe how their contribution to the organisation is recognised and valued. 	Definitions of 'contribution', 'recognised' and 'valued' are unclear.	
7	People are encouraged to take ownership and responsibility by being involved in decision-making	<ul style="list-style-type: none"> 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. 	Definitions of 'promote', 'sense of ownership', 'responsibility', 'encouraging', 'decision-making', 'representative groups' are unclear.	<p>Assumes that people wish to take ownership and responsibility.</p> <p>Appropriateness and outcomes of decision-making are not taken into account, with an assumption made around a specific approach towards decision-making.</p>
		<ul style="list-style-type: none"> 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 for their role. 	Definitions of 'encouraged', 'involved', 'decision-making', 'affects', 'performance', 'teams', 'appropriate' are unclear.	
		<ul style="list-style-type: none"> 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. 	Definitions of 'encouraged', 'take ownership', 'responsibility', 'decisions', 'affect', 'performance', 'teams', 'appropriate' are unclear.	



Ref.	Indicators (2004 version)	Evidence requirements	Definitional issues	Application/relevance
8	People learn and develop effectively	<ul style="list-style-type: none"> Managers can describe how they make sure people's learning and development needs are met 	Definitions of 'make sure', 'needs' and 'met' are unclear.	Insufficient differentiation between individual requirements and those that are related to the organisation: it is possible that these will conflict in reality.
		<ul style="list-style-type: none"> People can describe how their learning and development needs are met, what they have learnt and how they have applied this in their role 	Definitions of 'needs', 'met', 'learnt' and 'applied' are unclear.	
		<ul style="list-style-type: none"> People who are new to the organisation, and those new to their role, can describe how their induction has helped them to perform effectively. 	Definitions of 'new', 'induction', 'perform' and 'effectively' are unclear.	
9	Investment in people improves the performance of the organisation	<ul style="list-style-type: none"> Top managers can describe the organisation's overall investment of time, money and resources in learning and development. 	Definitions of 'overall', 'investment', 'money' and 'learning and development' are unclear.	The evidence requirements' focus on learning and development belies the basis of the Standard in evaluating training: other variables exist that may enhance organisational performance.
		<ul style="list-style-type: none"> Top managers can explain, and quantify where appropriate, how learning and development has improved the performance of the organisation 	Definitions of 'explain', 'quantify', 'improve' and 'performance' are unclear.	
		<ul style="list-style-type: none"> 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 	Definitions of 'evaluation', 'investment', 'people', 'used to develop', 'strategy', 'performance' are unclear.	
		<ul style="list-style-type: none"> Managers can give examples of how learning and development has improved the performance of their team and the organisation. 	Definitions of 'learning and development', 'improved', 'performance' and 'team' are unclear.	
		<ul style="list-style-type: none"> People can give examples of how learning and development has improved their performance, the performance of their team and that of the organisation. 	Definitions of 'learning and development', 'improved', 'performance' and 'team' are unclear.	
10	Improvements are continually made to the way people are managed and developed	<ul style="list-style-type: none"> 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. 	Definitions of 'evaluation', 'investment', 'people', 'resulted in', 'improvements', 'strategy', 'managing' and 'developing' are unclear.	Very broad Indicator that is highly context-specific, to the extent that any assessment is rendered meaningless.
		<ul style="list-style-type: none"> Managers can give examples of improvements they have made to the way they manage and develop people. 	Definitions of 'improvements', 'the way', 'manage and develop' are unclear.	
		<ul style="list-style-type: none"> People can give examples of improvements that have been made to the way the organisation manages and develops its people. 	Definitions of 'improvements', 'the way', 'manages and develops' are unclear.	

This review therefore highlights significant limitations in the current Standard:

Limitations	Explanation
Imprecise definitions	<ul style="list-style-type: none"> The definitions within a number of Indicators and evidence requirements are sufficiently broad to call into question the consistency of interpretation, and the extent to which objective assessment is possible across different organisations
Indicators belie Investors in People Standard's true position	<ul style="list-style-type: none"> As already seen within this evaluative paper, the Standard focuses on quality training processes. Given this, the repositioning of the Standard as a business improvement tool appears excessive, and misrepresentative.
The Standard encourages an individual employee perspective as opposed to a commercial individual-organisational perspective	<ul style="list-style-type: none"> We would regard this philosophy as being of questionable relevance to commercial performance.
Assumptions are made around the nature of roles and organisational structures (e.g. relating to teams and managers)	<ul style="list-style-type: none"> Organisations with matrix structures or multiple reporting lines, or indeed of smaller scale, are unlikely to relate easily to these Indicators.
Assumptions are made around the linkage between employee involvement and organisational performance	<ul style="list-style-type: none"> In the absence of any named study in support of this assumption, this assumption again suggests an employee-centric rather than commercial view of the organisation.
Assumptions are made around the similarity of organisational operating models	<ul style="list-style-type: none"> Employees do not play the same role in organisational operating models, acting in some cases as resource and in other cases as assets or liabilities.
Indicators are process-driven	<ul style="list-style-type: none"> Assessment is adjudged on attainment against these indicators and individual interpretation. It is accordingly difficult to assign evaluative judgement based on an arbitrary percentage or assessment, as to whether performance is 'good', 'bad', 'indifferent' or has any impact.

Profile framework

"Where's the benefit, if the local fish and chip shop has it too?"

Source: HR Director in discussion with International School of HCM.

The original Profile framework was launched in 2002 as a continuous improvement tool for organisations already recognised against the Standard, as a different structure to that of the Standard. In 2005, Investors in People UK relaunched the Profile framework, now aligned with the Standard, apparently in a bid to increase relevance of the Standard for larger organisations. The Investors in People Standard appeared to be of lesser value through the fact that, prior to 2005, one single level of attainment existed. As a growing number of organisations became recognised, differentiation was reduced.

The Profile tool was developed in an attempt to differentiate between levels of organisational performance against the 10 Indicators as shown above. Accordingly, any review of the Profile framework starts from the basis that, as a framework, it possesses the same flaws as the basic Investors in People Standard.

Whilst the Profile therefore attempts to provide a more 'stretching' basis for assessment, it is essentially an extension of the basic Standard. Accordingly, it suffers from the same issues previously noted:

- **Imprecise definitions**
- **Indicators belie Investors in People Standard's true position**
- **The Standard encourages an individual employee perspective as opposed to a commercial individual-organisational perspective**
- **Assumptions are made around the nature of roles and organisational structures (e.g. relating to teams and managers)**
- **Assumptions are made around the linkage between employee involvement and organisational performance.**
- **Assumptions are made around the similarity of organisational operating models**
- **Indicators are process-driven, not evaluative or output-driven**

Profile levels

The Profile tool introduces four levels that are intended to represent 'evolution' from the basic Standard. In addition to the basic evidence requirements, Level 2/3 (combined) evidence requirements and Level 4 evidence requirements are included. The following table summarises these levels and the criteria for an organisation to achieve a given level.

Profile Level	Criteria for achievement
1	Same as 'basic' Standard (see above).
2	Organisation is deemed to meet at least 50% of the Level 2/3 evidence requirements.
3	Organisation is deemed to meet all Level 2/3 evidence requirements.
4	Organisation meets all Level 4 evidence requirements.

This accordingly represents different steps in performance: the 'attainment gap' between Level 4 and Level 3 is greater than the 'attainment gap' difference between Level 2 and 3, with only a minor stretch between Level 1 and Level 2. This suggests that the framework is skewed to allow organisations to achieve Level 2 with relative ease.

Moreover, there is no evidence to suggest that attainment of a higher level links with improved organisational outcomes or any particular benefit, beyond a more stringent level of compliance with the Standard. It also appears that achievement is based on a predominantly subjective Assessor viewpoint (with review by Recognition panel), as opposed to a quantifiable evaluation.

To illustrate this, the following page reviews a selection of the Level 4 evidence requirements (for Top Managers). This shows that the definitional and assumptive issues previously identified in the basic Standard still exist within the Profile framework.

This analysis reveals specific issues around a number of underlying assumptions, with an apparent focus on social and/or societal aspects of organisations. From a commercial perspective, this suggests questionable or limited application of the Profile framework as an organisational development tool in any meaningful or value-contributing way.



Ref.	Indicators (2004)	Level 4 evidence requirements (Top Managers)	Potential issue
1	A strategy for improving the performance of the organisation is clearly defined and understood	<ul style="list-style-type: none"> Top managers make sure the core values are at the heart of the organisation's strategy and govern the way it operates Top managers can describe how social responsibility is part of the culture of the organisation 	Assumes that organisational values should drive strategy, and that social responsibility is linked with organisational performance.
2	Learning and development is planned to achieve the organisation's objectives	<ul style="list-style-type: none"> Top managers can describe how they have created a culture that encourages continuous learning and promotes the development of skills and knowledge at every level 	'Culture' is difficult to define. Assumes that skill and knowledge development is required at every level.
3	Strategies for managing people are designed to promote equality of opportunity in the development of the organisation's people	<ul style="list-style-type: none"> Top managers can describe how the organisation's recruitment and selection strategies are linked to its business strategy and are designed to make sure there is a talented and diverse workforce that is able to achieve the organisation's vision Top managers can describe how the organisation's equality and diversity strategies are linked to its business strategy and applied throughout the organisation Top managers can describe how the organisation's work-life balance strategies are linked to its business strategy and applied throughout the organisation 	Whilst equality, diversity, and work-life balance approaches are deemed important, this indicator assumes that these approaches are linked with improved organisational performance.
4	The capabilities managers need to lead, manage and develop are clearly defined and understood	<ul style="list-style-type: none"> Top managers can describe how the organisation's leadership and management strategy is linked to its business strategy and takes account of external good practice Top managers can describe how they create an environment where everyone is encouraged to develop leadership qualities 	Assumes that it is appropriate or possible for everyone to develop leadership qualities – this may not be the case.
5	Managers are effective in leading, managing and developing people	<ul style="list-style-type: none"> Top managers can describe how they act as role models for inspirational leadership and have an open, honest and trusting management style Top managers can describe how they have made coaching part of the organisation's culture 	Definition of 'inspirational.' Assumes that all organisations require inspirational leadership - this is not the case.
6	People's contribution to the organisation is recognised and valued	<ul style="list-style-type: none"> Top managers can describe how the organisation's reward and recognition strategy is linked to its business strategy and externally benchmarked Top managers make sure the organisation has a forward thinking benefits strategy with policies that go beyond legal requirements 	Assumes that a forward-thinking benefits strategy is beneficial to employees (consider current approaches to private sector pension provision).
7	People are encouraged to take ownership and responsibility by being involved in decision-making	<ul style="list-style-type: none"> Top managers can describe how consultation and involvement is part of the organisation's culture Top managers can describe how they involve people in designing consultation arrangements Top managers can describe how they have created a culture where people aim for continuous improvement 	Assumes that consultation leads to enhanced organisational performance. Definition of 'involvement' and the contextual elements around decision making.
8	People learn and develop effectively	<ul style="list-style-type: none"> Top managers can describe how they have created a culture where all learning is valued Top managers can describe how they make sure mentoring opportunities are available 	This subverts the aim of the original Standard, which linked learning to organisational requirement.
9	Investment in people improves the performance of the organisation	<ul style="list-style-type: none"> Top managers make sure the organisation has a flexible and effective approach to measuring and reporting the return on investment on its people strategies Top managers make sure that the return on investment on its people strategies is reported clearly to all stakeholders 	'People strategies' at level 4 has an unclear definition and is disconnected from the evidence requirement at Level 1, which asks about learning and development.
10	Improvements are continually made to the way people are managed and developed	<ul style="list-style-type: none"> Top managers can describe how the organisation has used internal and external benchmarking to review and improve its strategies for managing and developing people Top managers can demonstrate an improvement in people's view of how they are managed and developed 	This indicator appears to focus on process rather than performance or outcomes.

Assessment process variability

This whitepaper has shown how the Investors in People Standard lacks the rigour or credibility to be applied as an evaluative or organisation developmental tool, despite efforts to maintain its take-up in UK organisations through repeated rewriting of the Standard.

The final aspect of the inappropriateness of the Standard as a credible business performance instrument concerns the manner in which organisations are assessed.

Certain key features lead us to conclude that the assessment regime for granting Investors in People status is far from consistent. These features include:

Language utilised in the Standard calls for highly subjective evaluation

We have identified that the current evidence requirements are worded in such a way that the extent to which rigorous and consistent evaluation can take place is questionable. To take one example, one evidence requirement states, "People can describe how they contribute to the organisation and believe they make a positive difference to its performance". This raises questions around: definitions around 'positive' and 'contribute'; questions of how the Assessor can evaluate whether people describe their contribution accurately, assessing the extent of their belief, and any linkage of this to organisational outcome.

Increased reliance on interviews and reduction of documentary evidence

Linked to the concern illustrated above, the requirement for documented evidence has been reduced in post-2000 versions of the Standard, placing greater reliance on the employee interviews. Without independent verification, the Assessor has to take what people report in interview at face value.

Advance preparation of interviewees is permitted

Whilst briefing staff about the nature of the interviews is not unreasonable, there is evidence amongst the academic studies reviewed and market intelligence conducted that this provides the opportunities for organisations and individuals to 'game' the system, particularly in light of the weight placed on the individual interviews.

Assessors/Advisers are independent sub-contractors, leading to limitations in overall quality control

In light of the highly subjective nature of assessment, the interpretation of the individual Adviser/Assessor becomes the key factor in any accreditation decision. As Advisers are not employed by either Regional Quality Centres nor by Investors in People UK, it remains unclear where the accountability sits for quality and consistency of approach.

In light of these concerns, it is difficult to draw the conclusion that accreditation as an Investors in People organisation can have ongoing value for organisations today, and that the process of assessment accordingly raises many questions around the degree of consistency and quality in the award of IiP status.

Conclusions

This evaluation has demonstrated that:

- Available research indicates that there is little evidence that Investors in People accreditation leads to tangible commercial benefit, and therefore the claim that it is a business improvement tool is open to question and potentially without foundation
- The Investors in People Standard is a process framework, primarily based on training despite revisions
- Organisations attempting to comply with the Standard run the risk of misdirected investment and/or potential over-investment
- The current iteration of the Investors in People Standard (10 indicators) does not appear to have any material business case and therefore casts doubt on the degree to which it links to business performance
- It is difficult to substantiate IIP's claim that accreditation as an Investors in People organisation has any practical value for organisations
- The process of assessment raises many questions around the degree of consistency and quality in the award of Investors in People status, particularly around underlying assumptions, definitions and individual assessor interpretation
- The overly long and inappropriate 3-year assessment cycle, given the dynamic nature of organisations and people management
- The value of the badge (given the limitations of the 'pass/not pass' scheme) is diminishing as more organisations have obtained Investors in People status (though 'badging' still appears as a driver for involvement)
- The Standard is not a sufficiently robust vehicle for organisation development (and in fact can be misleading) though this is the prime marketing message to organisations
- In terms of medium to large employer organisations, there is a heavy bias towards the public sector
- Investors in People as a private company receives c. £5m in direct grants and aid, of which £1.8m is spent on marketing, £1.6m on staff and £0.9m on administration
- Since 1997, the organisation has been supported by £32million of public funds, though funding is not assured after 2007¹⁹
- In 2005, IIP was named as one of the top nine "most useless" quangos²⁰

This begs the further question: what is the most appropriate role for Investors in People as a badge of accreditation?

¹⁹ Source: Investors in People UK annual reports

²⁰ Source: Essential Guide to British Quangos 2005, reported in Personnel Today, 11 February 2005

A recent study by the Learning and Skills Council identified that “slightly fewer than 1.3 million workers were described by employers as not fully proficient”²¹. Given that the Standard, in its initial version, evaluated approaches towards training provision, and the Investors in People UK organisation has maintained close links with Sector Skills Councils and the Learning and Skills Council, it would appear that this area remains ‘home turf’ for the Investors in People Standard.

Thus it is our contention that the following conclusions are drawn:

1. That the aim of targeting a specific percentage of the UK workforce has been at the root of increasing efforts (and expenditure of taxpayer funds) to maintain the Investors in People UK organisation and market an insufficient Standard. This target should be withdrawn. If industry sees Investors in People as a meaningful product, it will continue to purchase it. If not, the Investors in People UK organisation and network of Regional Quality Centres and independent Advisers/Assessors can be scaled back. This creates the alternatives either of increased savings to the public purse, or of distributing a proportion of the c. £5m grant and related funding currently supporting Investors in People UK operations as individual training grants to small businesses.
2. Given the issues around skill gaps identified and the questions raised around the organisational relevance of aspects of the current Standard, Investors in People should accordingly withdraw from their claims and attempts to provide a ‘business performance tool’ with advisory support, instead ensuring that organisations continue to benefit from a consistent approach towards development.
3. That the Profile framework is not only unsuited to any meaningful commercial application within large organisations, but has the potential to result in skewed company decision making and result in poor allocation of internal resource. This should be withdrawn. This will result in the dissolution of the joint venture with Penna plc that currently provides Investors in People Corporate Solutions, on the grounds that it is surplus to requirements and creates an artificial barrier to organisations accessing more expert suppliers.
4. In view of this, the additional models (Leadership & Management, Work-Life balance and Recruitment & Selection) should be dropped. Review of internal Investors in People UK documentation shows that take-up of the separate Leadership & Management and Work-Life balance modules has been “disappointing”, with 14 and 9 recognitions respectively²². This would indicate that industry sees no relevance for these accreditations.
5. That a role still exists for Investors in People UK and the Standard in line with the original remit, in ensuring that organisations possess baseline processes for effective development of their employees. This is given particular contemporary relevance through increased concerns around declining standards in baseline skillsets in young people/graduates entering the workforce, particularly in terms of literacy and numeracy. We note an apparently increasing level of focus on schools, where the introduction of baseline training approaches may well bring benefit²³.
6. Whilst other, more scientific and rigorous tools exist to evaluate the linkages and impact between individual development and people management practice, Investors

²¹ Reported in the Financial Times, 13 March 2006

²² Source: Investors in People UK 2004-5 Business Plan, April 2004

²³ As evidenced in the inclusion of a number of case studies within the sector; its identification as a key focus areas in the Investors in People UK Business Plan 2005-06 and in a response to a House of Lords question, December 2005 (Source: Hansards, 5 Dec 2005, Column WA78).

in People still appears to have some role to play in assuring that small businesses can benefit from effective baseline training approaches.²⁴

7. The introduction of other people management Standards (as noted above) raises the question of grant/fund allocation, and the prospect of a 'market' tender process rather than an automatic 'right' granted to Investors in People.

²⁴ See accompanying International School of HCM whitepapers relating to evaluative approaches towards human capital management, VB-HR™ Rating and the HCMI Standard (www.hcmiglobal.org)

Appendix I – The Changing Standard

The following table illustrates how the focus in the Investors in People Standard has changed significantly over a decade.

Ref.	1994 Indicators (23)	2000 Indicators (12)	2004 Indicators (10)
1	The commitment from top management to train and develop employees is communicated effectively throughout the organisation	The organisation is committed to supporting the development of its people.	A strategy for improving the performance of the organisation is clearly defined and understood
2	Employees at all levels are aware of the broad aims of the organisation	People are encouraged to improve their own and other people's performance.	Learning and development is planned to achieve the organisation's objectives
3	The organisation has considered what employees at all levels will contribute to the success of the organisation, and has communicated this effectively to them	People believe their contribution to the organisation is recognised.	Strategies for managing people are designed to promote equality of opportunity in the development of the organisation's people
4	Where representative structures exist, communication takes place between management and representatives on the vision of where the organisation is going and the contribution that employees (and their representatives) will make to its success	The organisation is committed to ensuring equality of opportunity in the development of its people.	The capabilities managers need to lead, manage and develop are clearly defined and understood
5	A written but flexible plan sets out the organisation's goals and targets	The organisation has a plan with clear aims and objectives which are understood by everyone.	Managers are effective in leading, managing and developing people
6	A written plan identifies the organisation's training and development needs, and specifies what actions will be taken to meet those needs	The development of people is in line with the organisation's aims and objectives.	People's contribution to the organisation is recognised and valued
7	Training and development needs are regularly reviewed against goals and targets at the organisation, team and individual level	People understand how they contribute to achieving the organisation's aims and objectives.	People are encouraged to take ownership and responsibility by being involved in decision-making
8	A written plan identifies the resources that will be used to meet training and development needs	Managers are effective in supporting the development of people.	People learn and develop effectively
9	Responsibility for training and developing employees is clearly defined and understood throughout the organisation, starting at the top	People learn and develop effectively.	Investment in people improves the performance of the organisation
10	Objectives are set for training and development actions at the organisation, team and individual level	The development of people improves the performance of the organisation, teams and individuals.	Improvements are continually made to the way people are managed and developed
11	Where appropriate, training and development objectives are linked to external Standards, such as National Vocational (NVQS) or Scottish Vocational Qualifications (SVQs) and units	People understand the impact of the development of people on the performance of the organisation, teams and individuals.	
12	All new employees are effectively introduced to the organisation and all employees new to a job are given the training and development they need to do that job	The organisation gets better at developing its people.	
13	Managers are effective in carrying out their responsibilities for training and developing employees		
14	Managers are actively involved supporting employees to meet their training and development needs		



Ref.	1994 Indicators (23)	2000 Indicators (12)	2004 Indicators (10)
15	All employees are made aware of the training and development opportunities open to them		
16	All employees are encouraged to help identify and meet their job-related training and development needs		
17	Action takes place to meet the training and development needs of individuals, teams, and the organisation		
18	The organisation evaluates the impact of training and development actions on knowledge, skills and attitude		
19	The organisation evaluates the impact of training and development actions on performance		
20	The organisation evaluates the contribution of training and development to the achievement of its goals and targets		
21	Top management understand the broad costs and benefits of training and developing employees		
22	Action takes place to implement improvements to training and development as a result of evaluation		
23	Top management's continuing commitment to training and developing employees is demonstrated to all employees		

Appendix II – Additional research

In addition to the recent articles and research papers reviewed in the preparation of this whitepaper, the following documents were identified. In light of their publication date, detailed review was not performed (particularly given the changes to the Standard from 2000), and summary overviews are identified in the text below.

Investors in People: Its impact on business performance. Harris, M. *IoD research paper*, 2001.

This paper finds that Investors in People accreditation has had a positive impact on the training systems in participating organisations, but found only limited impact on organisational performance through earnings, productivity or profitability.

Customers' views of the results of managing quality through ISO 9002 and Investors in People in leisure services. Lentell, R. *Managing Leisure 6*: 15-34, 2001.

This academic study contrasts the impact of Investors in People and ISO 9002 in six London local authority sports and leisure facilities. Relative to ISO 9002, Investors in People was associated with higher customer opinions of staff, although the author does not claim a causal relationship.

People and Productivity – additional research. Investors in People UK, October 2001.

Investors in People commissioned NOP Business to survey organisations on issues relating to productivity. This identified that one in five IIP accredited organisations believed that the investment in people required to achieve Investors in People recognition has significantly increased the productivity of their people. We note that this survey was reliant on telephone surveying of either the MD or a senior officer within Personnel or Operations: opinions are therefore qualitative and unverified.

Investors in People: how a large public sector organisation in the UK dealt with a new national training initiative. Emberson, M. and Winters, J. *International Journal of Training and Development 4*:4, 259-271, 2000.

This academic study identifies that the literature on the claims made for Investors in People is inconclusive. It concludes that any assessment of the impact of the Standard is subjective and requires value judgements.

Doing business better: the long-term impact of Investors in People. Tamkin, P., Hillage, J., Cummings, J., Bates, P., Barber, L. and Tackey, N.D. *Institute for Employment Studies 2000*.

This report found that implementation of Investors in People led to perceived improvements in training evaluation, induction, identifying training needs and increased managerial involvement in training. The report stopped short of attributing causality between Investors in People and business outcomes, noting that the Standard can only support business planning through introducing effective HR approaches.

The return on investors. Hillage, J. and Moralee, J. *Institute for Employment Studies 1996*.

This research, based around a survey of 1,800 workplaces, found that Investors in People accreditation resulted in improvements to training processes. Training benefits were more frequently cited than improvements to business performance. This report also found that employers with fewer than 50 employees were more likely to expect a larger impact through involvement in IIP.



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