



Quest 4 – Managing the Team

Guidance Notes

Module Outcome
Staff are trained and qualified to deliver the standard of service promised to the customer.
Staff are kept up to date and are well informed of the organisation's objectives and performance.
The Organisation has policies and processes in place to support the well-being of its staff and customers.
The professional development of staff allows for the progression of individuals and the achievement of the organisation's objectives.

Mystery Visit					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
Do the team appear to be well-managed and carry out their duties and activities in a professional manner?	<p>The team have a negative approach and does not appear to follow any standards.</p> <p>The facility and team do not promote a welcoming and professional environment.</p>	<p>There is minimal evidence that standards are being followed.</p> <p>The team are overall behaving in a safe manner conducting day-to-day tasks such as setting up equipment and using communication systems.</p>	<p>There is a clear commitment by the team to delivering activities to adhere to standards.</p> <p>However, opportunities for improvement had been identified in the consistency of delivery.</p>	<p>There is a clear commitment by the team to deliver activities professionally.</p>	<p>Team members have a positive approach to delivery standards.</p> <p>The consistency of delivery has a positive impact on customer behaviour.</p>

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Mystery Visit					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<p>Did the activity that you took part in feel safe and enjoyable? (If this was a coached or supervised session, please comment on the standard of coaching/supervision).</p>	<p>The activity did not feel safe, effective or enjoyable to take part in.</p>	<p>The activity adhered to national and industry guidelines.</p>	<p>There is a clear commitment by the team delivering activities to adhere to standards, however, opportunities for improvement have been identified in the consistency of delivery.</p>	<p>There is a clear commitment by the team to delivering activities and high levels of supervision to adhere to all standards.</p>	<p>The deliverer is proactive in explaining how the activity should be delivered by customers to adhere to guidance, whilst also making it fun and enjoyable.</p>
	<p>The standard of teaching and supervision is not to the required standard to ensure a safe environment.</p>	<p>The activity content and delivery met the expectations outlined in the information provided by the facility.</p>	<p>Although the activity was not a coached session, staff proactively patrolled or monitored the area.</p>	<p>There is a consistently high standard of delivery before, during and after the activity.</p>	<p>The supervision of the activity was of a very high standard, and all relevant NGB guidance was followed.</p>
	<p>The activity was not supervised, and there was no induction or method by which to summon help.</p>	<p>Although the activity was not supervised, the activity area and equipment provided were in good working order.</p>			

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Plan					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
How do you plan to communicate with your staff to ensure that they remain well-informed?	There are no systems in place to keep staff up to date.	There is an informal process to pass on updates and information.	Team meetings are scheduled and held on a regular basis to keep staff informed.	There is a formal staff newsletter that keeps staff informed.	Staff are involved in working groups and actively asked to contribute to strategy, policies, and procedures.
		There is evidence that some staff meetings and shift handover meetings take place.	There is evidence that ongoing updates are given to the team.	There is an ongoing training and communication programme in place for all the team.	Two-way communication systems are in place and management encourages team members to put forward ideas and give feedback.
			Meetings are minuted and circulated to relevant staff.	A comprehensive range of team members has received general and site-specific training.	Monthly training updates and content are planned in advance.
				Updates to the team include new promotions and marketing briefs.	Product and price changes are communicated in advance with an explanation of the changes being made.
					Innovative technology is used to communicate with staff.

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Plan					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<p>How do you plan to deliver training and development for your staff and volunteers?</p>	<p>There is no evidence of a policy or programme in place to support volunteers and staff.</p>	<p>There is minimal evidence of a policy or programme in place to provide staff and volunteers with basic operational training and facility inductions.</p>	<p>All volunteers and staff receive full operational (including NOP/EAP) training.</p> <p>Most volunteers complete an organisational induction pack, in which their duties and responsibilities are clearly outlined.</p> <p>All staff complete an organisational induction pack, in which their duties and responsibilities are clearly outlined.</p> <p>There is a staff training matrix in place</p>	<p>Volunteers and staff complete a comprehensive induction which includes competency assessments.</p> <p>There is a mentoring and observation system in place to provide volunteers with ongoing support and advice.</p> <p>There is a policy in place which upskills volunteers and staff in new qualifications.</p> <p>There is a detailed staff training matrix in place for all job roles.</p>	<p>Volunteers receive refresher training on an annual basis.</p> <p>There is evidence of a system which encourages volunteers to be upskilled and use their new qualifications to help increase activity levels.</p> <p>Staff and volunteer training requirements are reviewed on an annual basis. The review includes staff feedback, guidance and best practices from statutory organisations and governing bodies.</p> <p>There is an adequate resource planned to deliver a detailed staff training matrix in place for all job roles.</p> <p>There is a plan to deliver training in a blended method, combining online with face-to-face training.</p>

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Do					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
How do you ensure that staff are qualified to national industry standards?	There is no evidence of staff qualifications linked to specific job descriptions.	Job descriptions are in place and readily available to all staff.	There is a resource assigned to ensure statutory qualifications and training are strictly adhered to.	Staff are actively encouraged to complete additional and complementary training to enable them to perform to a higher standard.	There is a comprehensive job evaluation system in place that is reviewed regularly to ensure its adherence to industry standards.
	Staff are not qualified for a recognised industry role.	Qualifications for each role adhere to industry standards and best practices.	There is evidence of a protocol linked to any action required linked to non-compliance of qualifications/training.	A robust mystery visits programme linked to core skills (customer service and experience) is in place linked to a programme of corrective behaviour training.	There are clear role-specific standards and requirements communicated to each member of staff linked to individual performance KPIs.
	There is no evidence of ongoing training role-specific training or development.	There is an annual training plan in place for statutory qualifications.	Mystery visits are in place to provide feedback on general performance and customer service.	A dedicated resource is in place to monitor staff performance, linked to multiple agreed KPIs.	There is a continual development programme in place in which the staff member is actively engaged.
			There is an annual plan in place to deliver non-mandatory training to some members of staff.	There is an annual plan in place to deliver non-mandatory training to all members of staff.	Multiple methods are utilised to monitor staff members' performance and general suitability for their role.

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Do					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<p>How do you ensure that contracted staff and regular casual staff have one-to-one opportunities to discuss performance, wellbeing and personal development?</p>	<p>There is no evidence that there is a system in place to provide one-to-one opportunities with staff.</p>	<p>There is evidence of an informal process where all staff have regular one-to-ones with their direct line supervisors.</p> <p>There is a staff appraisal policy in place.</p>	<p>All of the teams who complete staff appraisals or one-to-one meetings have received training in these areas.</p> <p>There is a set schedule or policy in place which outlines the minimum number of one-to-one opportunities which should be available to staff.</p>	<p>There is refresher training and best practices shared on how to deliver quality staff appraisals or 121s.</p> <p>Management is tasked to complete staff appraisals or one-to-ones against a set schedule.</p> <p>Staff wellbeing is proactively monitored by asking for regular feedback from staff in both informal and formal methods.</p>	<p>There is a dedicated resource that proactively monitors the wellbeing and development of staff.</p> <p>There is evidence that all staff take part in an annual appraisal or one-to-one and are given clear goals and areas for development with progress tracked quarterly.</p> <p>There is a resource in place that reviews the quality and content of staff appraisals.</p> <p>There is evidence of peer-to-peer and mentoring support in place.</p>

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Do					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<p>Do you have an Equality, Diversity, and Inclusion Policy (EDI) on which staff and volunteers have been trained?</p>	<p>There is no evidence of an EDI policy or a related policy which has been reviewed within the past 3 years.</p> <p>EDI training is not included in all staff and volunteer inductions.</p>	<p>There is minimal evidence of an EDI policy with staff and volunteers completing a single training session on this when it was published.</p> <p>The EDI policy is accessible to staff and volunteers upon request.</p>	<p>There is evidence of an EDI policy with a review of the document every 2 years.</p> <p>Staff and volunteer training is completed in line with reviews and changes made to the policy.</p> <p>EDI training is included in inductions and includes a competency test.</p>	<p>There is evidence of an EDI policy with an annual review and staff training on the document.</p> <p>The document is stored in an area that staff and volunteers are readily encouraged to access.</p> <p>EDI training is included in the annual training matrix for all job roles.</p>	<p>There is evidence of an annually reviewed EDI policy on which staff and volunteers are trained.</p> <p>Staff are asked for their feedback on EDI issues which feed into policy updates.</p> <p>Staff are invited to help deliver staff training and provide examples of their own experiences to colleagues to enhance understanding.</p>



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Do					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<p>How do you ensure that the workforce is inclusive and representative of the local and served community?</p>	<p>There is no evidence that the organisation has attempted to make the workforce is reflective of the local community.</p> <p>The facility staff are not aware of their communities' local demographics and therefore do not know if the workforce is reflective of the local community.</p>	<p>There has been effort to recruit staff that the community will be able to relate to and feel comfortable around.</p> <p>The facility knows what its staff and customer demography is.</p>	<p>Staff vacancies are marketed within key local facilities and with local stakeholders to encourage applications from local residents.</p> <p>The workforce development plan has a proactive approach to embedding inclusion across the organisation, based on relevant insight.</p> <p>The recruitment policy includes an aim to recruit staff that the community will be able to relate to and feel comfortable around.</p>	<p>Recruitment data is reviewed and compared to local demographic data to check how reflective the workforce is.</p> <p>There is evidence of a conscious effort to recruit a diverse range of staff with EDI at the forefront.</p> <p>There is a communication and marketing plan in place which uses images that reflect the local community.</p>	<p>The organisation aims to recruit from a diverse group of people into a wide range of roles and actively encourages progression to senior positions.</p> <p>The organisation supports specific and inclusive programmes which provide employment opportunities for people.</p> <p>All staff receive high-quality inclusion training regardless of role through a well-planned approach.</p>

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Measuring, Monitoring and Reviewing					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<p>How do you measure, monitor, and review the wellbeing and satisfaction levels of your staff and volunteers?</p>	<p>There is no evidence that staff and volunteer wellbeing and satisfaction levels are monitored.</p>	<p>Some staff and volunteers have been asked to complete staff satisfaction surveys.</p> <p>Staff wellbeing is discussed in some appraisals and 121 meetings.</p>	<p>Staff wellbeing is included in all appraisals and one-to-one meetings.</p> <p>Staff can provide feedback via a suggestion box or anonymously to the management team.</p> <p>Exit questionnaires are in place.</p>	<p>Staff and volunteer satisfaction surveys are completed on an annual basis.</p> <p>Staff exit questionnaires are sent to all ex-employees and their findings are reviewed.</p> <p>A sickness and absence monitoring procedure are in place.</p> <p>The productivity and performance of the organisation are reviewed,</p> <p>Staff feedback from suggestion boxes is monitored and reviewed.</p>	<p>Staff and volunteer satisfaction surveys are completed on an annual basis, with their findings feeding into a live improvement plan.</p> <p>Employee retention figures are collated and reviewed on an annual basis.</p> <p>Staff absences are reviewed for trends across multiple departments and facilities.</p> <p>Feedback from 121 meetings is formally reviewed for trends in feedback or areas of improvement.</p> <p>Volunteer numbers are monitored to check for any issues with regard to retention and satisfaction.</p> <p>Net Promoter Scores (NPS) or Employee Satisfaction Index (ESI) scores are actively recorded and reviewed.</p>



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Measuring, Monitoring and Reviewing					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<p>How do you measure, monitor, and review the professional development and performance of your staff and volunteers?</p>	<p>There is no evidence that staff and volunteer professional development and performance are monitored.</p>	<p>There is some evidence that staff and volunteer professional development and performance are monitored, but there are multiple areas of improvement identified.</p>	<p>There is a staff training matrix in place for most roles, which is monitored by the management team.</p> <p>Staff are invited to attend performance reviews on an annual basis.</p> <p>The results of an annual staff survey are reviewed for feedback on training and professional development.</p>	<p>There is a staff training matrix in place for all staff and volunteers, which is monitored by the management team.</p> <p>Staff annual performance reviews are compulsory, scheduled and monitored for completion.</p> <p>There is a dedicated resource identified who monitors the completion of statutory training.</p> <p>The facility reviews the request for training from staff and feeds these into future training plans.</p>	<p>Each member of staff has an individual training plan, which is kept up to date and monitored for completion against agreed targets.</p> <p>There is evidence that volunteers are met with on a regular basis to discuss their training and development.</p> <p>There is a dedicated resource identified who monitors the completion of both statutory and professional development training.</p> <p>Innovative monitoring software is in place to track performance.</p>

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Measuring, Monitoring and Reviewing					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
Continued...				<p>Staff performance and attendance are monitored on a regular basis.</p> <p>Staff feedback on the quality of the training provided is reviewed,</p>	<p>Feedback from staff about training and their professional development is actively monitored and fed into training plans.</p> <p>The pass and adherence rates of staff gaining new qualifications and attending training are reviewed monthly.</p> <p>Internal promotion and progression rates are monitored.</p> <p>Performance review schedules are in place and monitored for adherence to the plan.</p>

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Impact					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<p>Can you demonstrate that leaders promote innovation, creativity, and enterprise and develop high morale? (a challenge for the staff and management)</p>	<p>The is no evidence that leaders d promote innovation, enterprise, or high morale.</p> <p>Staff do not feel comfortable or know how to communicate with their line managers or colleagues.</p>	<p>The facility provides ad hoc evidence of high team morale and performance.</p> <p>The performance of individuals is positively managed, and action is taken where required.</p> <p>Staff are invited to attend staff meetings and kept up to date on operational performance.</p>	<p>Team members have clear goals, defined roles and responsibilities and personal development plans in place.</p> <p>Junior staff play an active role in planning and running team meetings or staff training sessions.</p> <p>The team report they feel safe when working in the Facility.</p>	<p>Team members are given opportunities to put forward new ideas and discuss ways of working.</p> <p>Management has developed a high-performance culture.</p> <p>The site can articulate how standards have improved over time.</p> <p>The facility has developed a reputation for its high standards and can demonstrate this through not only high customer satisfaction levels but can also link this to footfall.</p>	<p>Leaders are good role models, provide vision and create a culture of continuous improvement and development.</p> <p>Leaders proactively recognise good work and acknowledge achievement and excellent work.</p> <p>The facility has a relentless continuous improvement process in place.</p> <p>The facility has a track record of low sickness levels.</p>



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Impact					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
Continued...				There is evidence that staff are encouraged to attend informal and social events to develop camaraderie amongst the team.	The positive impact and outcome of team engagement can be evidenced consistently over time using qualitative and quantitative data.