

LEVELheaded



Report of LEVELheaded's Assessment for the GoodOrganisation Standard

December 2008



Introduction

LEVELheaded has been awarded the GoodOrganisation Standard. The standard assesses whether an organisation is living up to its values and behaving in a responsible, ethical way.

LEVELheaded's overall score was 95%, well above the pass mark of 70% and the highest score yet received by any organisation.

The assessment process consisted of an online survey to all LEVELheaded's stake holders – client organisations, staff, suppliers and scrutineers. The survey responses were confidential, being sent directly to the awarding body, and the report they produced contained unattributed comments.

The auditors asked every client who had worked with us in the last 12 months to take part in the survey. They received 74 completed surveys, an excellent response level.

The following figures show the percentage of those who responded to each question who rated LEVELheaded as 'excellent' or 'above average' on the following ratings scale:

excellent	above average	average	below average	poor

- 95% - fair and responsible organisation
- 84% - clarity around our terms and conditions
- 91% - handling and protecting confidential and personal data
- 83% - undertaking clear, fair and responsible marketing
- 80% - how we handle any complaints/concerns
- 93% - requesting and using feedback
- 88% - providing clear product/service information
- 97% - delivering the agreed product or service
- 90% - delivering any agreed after-sales service
- 75% - protecting the environment. However, 61% of clients said they did not know about our environmental stance
- 93% - contributing to the non-profit sector
- 96% - ethical behaviour in terms of gifts, hospitality and entertainment. However, 61% of clients said they did not know

LEVELheaded's Response

We are clearly delighted with these findings. As a result of this feedback we have added our environmental policy and our policy on gifts etc. on our website.

Positive Comments

Positive comments received from LEVELheaded clients were:

“I think LEVELheaded’s processes to ensure equality and fairness are very stringent.”

“I do not have direct experience as a client of having to make complaints or raise concerns with LEVELheaded.”

“I have always found members of LEVELheaded team extremely professional in my dealings with them.”

“I handled all contractual services on a personal basis with the coach, Rodger O’Connell. I always sensed I was being treated fairly and professionally. Looking at the integrity of Rodger and hearing him talking to his staff I would think the areas which I currently marked as ‘don’t know’ would be above average as well. It is just because I do not have concrete experience with LEVELheaded on these issues that I preferred to choose the ‘don’t know’ option.”

“[LEVELheaded is] responsive to customer needs and takes on board suggestions for changes.”

“I particularly liked the way you tailored the training package to our specific needs.”

“I have been working with LEVELheaded for 18 months and have not had any complaints from staff about them, their services or their trainers.”

“LEVELheaded is an exceptional company.”

“My experience is that I find them extremely professional, responsive to the aims of the clients and their presentation and supplementary materials are always clear, concise and very well thought out.”

“I don’t know about [how they handle] complaints because I’ve never had to make any!”

“Their management training has had a very positive impact upon our organization. Their training sessions are invariably seen as excellent.”

“They competed for a tender with other training companies and the deliverables they offered at the time have been fully met.”

“Although I am not familiar with the contributions they make to the community and efforts to protect the environment, I support LEVELheaded being accredited on the strength of the excellent quality training and consultancy services they provide.”

“I found that not only are LEVELheaded fair but they are also practical. Making it easier for others to copy the behaviours and be fair through demonstration and commitment.”

“All our dealings with LEVELheaded have been very positive and we have been particularly impressed by the care taken to understand our business and then tailor training according to our needs, in very close consultation to us.”

“We received consistently good feedback from their courses from our staff and I would have no hesitation in recommending them for accreditation.”

“LEVELheaded are a truly dedicated group of trainers.”

“I am truly impressed with the organisation and the work they deliver.”

“I am very impressed by Janis Stanford based on her facilitation of two difficult senior staff away days and the preparation for these events.”

“We get exceptional customer service and professionalism from LEVELheaded which has value driven and highly competent staff.”

“We have had 3 different facilitators/trainers - all were characterised by intelligence, high level of knowledge and great sensitivity to our concerns. LEVELheaded are committed, professional and really want to offer the best possible level of service available. They are definitely one of the best training companies that I have come across.”

“On ethics, not sure that the continuum to poor applies here. I think ‘excellent’ because our experience is that LEVELheaded consultants are ethical in the way I expect (and anything less than that is by definition ‘poor’ – this is a pass/fail test, simple as that).”

LEVELheaded's Response

We would like to thank all those clients who invested extra time in adding encouraging and supportive comments. Your comments have affirmed and energised us.

Neutral Comments

Neutral comments, neither commendations nor criticisms, received from LEVELheaded clients were as follows:

“It is a great shame that LEVELheaded no longer run open, public courses.”

“I can only speak from a client's point of view; I have no idea what they are like with regards to the community and environment.”

“It is a shame that LEVELheaded no longer offers public courses, although I understand the business reasons behind withdrawing from this area of work. It would also be great if they offered training and consultancy in fundraising skills.”

LEVELheaded's Response

LEVELheaded used to deliver an extensive public courses programme. In 2007 we decided to hone our focus and concentrate purely on in-house training and consultancy. We felt this decision was in line with our commitment to producing the greatest impact amongst organisations who are working to make the world a better place.

After many years of growth and diversification, in fact, we decided over a three year period to stop providing NVQ's, public courses and venue hire. This has enabled us to dedicate our energies where we offer a genuine uniqueness.

Our public courses programme was a great financial success, however, we began to question the level of impact most individuals were able to have on their organisation when they returned to work. Whereas when we work with a whole team, an entire department or even a whole organisation we are able to witness change - processes improving, cultures shifting, skills growing and practices developing. The power of the many is able to truly make a difference to the success of an organisation.

In response to client feedback however, in spring of 2009, we are reintroducing a very limited programme designed to provide a limited number of courses which our clients tell us they are unable to source elsewhere. The first will be our famous five day programme for trainers, 'Designing and Delivering Training' which will run over September, October and November 2009.

In response to the feedback from the GoodOrganisation survey, we have added our environmental policy to our website to be more transparent with our clients about our commitments to minimising our impact on the environment.

Critical Comments

Through the GoodOrganisation process we also received a number of criticisms from clients. In line with our commitment to transparency we reproduce them here.

“I think there needs to be a greater commitment to keeping to deadlines in their consulting work, for example, in the production of documents, before, during and after a piece of work.”

“Slow delivery of agreed follow up after workshops has been a problem. You have no question on this, but preparation – while always leading to effectiveness on the day – has generally been very last minute despite being booked months in advance.”

LEVELheaded’s Response

We are disappointed that two clients have experienced us as not keeping to deadlines or not acting in a timely fashion. Our consultancy agreements, almost without exception, contain a clear timetable of action. We always aim to provide pre-course questionnaires, programmes, etc. in good time to fit in with the organisation’s timetables. It is true that being a small organisation with a high level of client demand, means we have to run a ‘tight ship’. This can mean that the unexpected - sickness or client request – can make it challenging, from time to time, to juggle our workloads well. We can assure you that lateness is rare and that we will support each member of the team to manage their diaries and commitments even better in future.

“They are sometimes unable to be responsive about a criticism. I think this may be owing to their co-operative style structure which means that no one can take responsibility for dealing with a client complaint before it has been discussed by the whole team. This may also reinforce ‘group think’ attitudes and engender difficulty in seeing the problem from the client point of view. Charging VAT on expenses incurred by visiting trainers is a bizarre practice. As a result with a problem with the hotel we found ourselves under budgeted on a course as a result of this. It would influence our decision to use your company again.”

LEVELheaded’s Response

Sadly this client is unhappy with our response to her/his complaint. We are deeply committed to resolving any issues a client may have with us. In fact we often use the phrase “We will do whatever it takes to put it right”. Every member of staff is aware of their responsibility to take complaints seriously and are authorised, apart from in the most unusual circumstances, to act on behalf of the group to resolve an issue. As a result of this feedback we have asked Janis Stanford, one of our Senior Consultants, to act as a central point for anyone who wishes to raise a complaint. This also provides people with someone else to speak to should they feel uncomfortable with raising an issue with the trainer or consultant concerned, or if they feel dissatisfied with the action taken by the member of staff to whom they have complained.

In relation to the charging of VAT on expenses, we have our ‘hands tied’. The services which LEVELheaded supply are subject to VAT. Across the years, we have sought advice from three different accountants and each of them has categorically told us that we have to charge VAT on all expenses we claim from the client. This is why we encourage client organisations to book and pay for expense items themselves. For instance, if a client organisation books and pays for a hotel they can reclaim the VAT on the hotel bill. If we arrange and pay for the hotel, we have to charge the amount plus VAT. As a result of this feedback, however, we are amending our agreement letters to make this issue even clearer in advance.

“My experience is that the mechanisms for gathering feedback on consulting work are not sufficiently thorough.”

“I would have expected a call after three to six months on the two contracts I let LEVELheaded to see if things needed refreshing or follow up”

LEVELheaded’s Response

We are saddened that on two different occasions we have not done enough to evaluate our work. LEVELheaded is genuinely committed to making a difference and to achieving the goals of the organisations we serve. It is our standard practice to, whenever possible, make evaluation a core part of a project. For instance, by undertaking a staff attitude survey at the beginning of a culture change programme and repeating the survey at the end to measure change.

We have diarised review points with clients when we can assess how a training programme is going and whether the needs of the group has changed or the programme could be improved. It is also standard practice for us to follow up with clients somewhere between one to six months after a programme or project has been completed (the exact time varies depending on the nature of the programme).

As a result of this feedback we are tightening up our systems to ensure we follow up with **all** clients in a period of one to six months.

“The training was excellent. The website was not 100% clear when I first checked and was unable to tell the location of the named contact I was given. However, it is the invoicing with which I was unhappy. If that could be sorted, I would recommend the company without reservation.”

LEVELheaded’s Response

On reading this feedback we realised we had fallen foul of assuming everyone knew that the majority of our staff are in our London office on one telephone number. As a result, we are amending our website section ‘Who We Are’ to make it absolutely clear where each member of staff is located and their e-mail address.

We are unclear what aspect of our invoicing did not work well for this client and therefore have been unable to take concrete action. If anyone has any feedback about our invoicing, we would be delighted to receive it.

Thank You

We would like to thank the 120 client organisations who agreed to take part in the survey undertaken by the GoodOrganisation. We thank you for your praise and constructive criticism and will continue to welcome any feedback you have for us.

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