

Qualification: CIPD Diploma in Applied Human Resources

Module Name: 5AMOC Contributing to the Management of Change

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Student Number: 1810266

CIPD Membership Number: 53274276

By signing below, I confirm that the work/evidence presented is my own, unaided work. I understand the regulations pertaining to candidate malpractice and the action that may be taken as a result.

Signed: 

Date: 16 December 2019

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CIPD Candidate evidence matrix

(CEM1)

Candidate name: Leanne Aitken			CIPD Membership/registration No.: 53274276			
Qualification title: CIPD Diploma in Applied Human Resources			Unique Learner No. (ULN): 1810266			
Unit code	Unit title	Assessment criteria no.	Evidence description	Evidence reference number	Assessor initials	I/V initials if sampled
5AMOC	Contributing to the Management of Change	1.1	Overview of the Digital Transformation Programme	EV1		
5AMOC	Contributing to the Management of Change	1.1	2019/20 Plan for the charity	EV2		
5AMOC	Contributing to the Management of Change	1.1	SWOT Analysis	EV3		
5AMOC	Contributing to the Management of Change	1.1	Proposed Adult Services Support Structure	EV4		
5AMOC	Contributing to the Management of Change	1.2	Stakeholder Mapping Worksheet	EV5		
5AMOC	Contributing to the Management of Change	1.2	Communications Plan	EV6		
5AMOC	Contributing to the Management of Change	1.3	Finance Director's Blog: Digital Transformation Update	EV7		
5AMOC	Contributing to the Management of Change	1.3	Example: Invite to Consultation Meeting	EV8		
5AMOC	Contributing to the Management of Change	1.4	Change Plan	EV9		
5AMOC	Contributing to the Management of Change	1.4	Letter from Line Manager (Nick Haake) – 15.11.19	EV10		
5AMOC	Contributing to the Management of Change	1.4	Gantt Chart	EV11		
5AMOC	Contributing to the Management of Change	2.1	Breakdown of Wales Admin Support required under Proposed Structure	EV12		
5AMOC	Contributing to the Management of Change	2.1	Wales: Request for Considerations under Proposed Structure	EV13		
5AMOC	Contributing to the Management of Change	2.1	Minutes of Meeting dated 16.10.19	EV14		
5AMOC	Contributing to the Management of Change	2.1	Example of a Job Description for a New Role under Proposed Structure	EV15		

5AMOC	Contributing to the Management of Change	2.2	Formal EAP Referral Form	EV16	
5AMOC	Contributing to the Management of Change	2.2	Grievance Policy	EV17	
5AMOC	Contributing to the Management of Change	2.3	Intranet Updates/Blog Progress Updates	EV18	
5AMOC	Contributing to the Management of Change	2.4/3.1	Compilation Feedback Summary from Area Manager Consultation Meetings	EV19	
5AMOC	Contributing to the Management of Change	2.4/2.5	Revised Timeline	EV20	
5AMOC	Contributing to the Management of Change	2.4	Emails dated 14.11.19 and 21.11.19 volunteering for Focus Groups	EV21	
5AMOC	Contributing to the Management of Change	2.5/3.4	Letter from Line Manager (Nick Haake) 01.12.19	EV22	
5AMOC	Contributing to the Management of Change	3.2	Questions iro New Roles under Proposed Structure	EV23	
5AMOC	Contributing to the Management of Change	3.2	Engagement Survey Extract	EV24	
5AMOC	Contributing to the Management of Change	3.2	Action Plan Template	EV25	
5AMOC	Contributing to the Management of Change	3.3	List of Digital Transformation Champions	EV26	
5AMOC	Contributing to the Management of Change	3.3	CEO email dated 13.12.19	EV27	
Candidate declaration:					
• I confirm that the work/evidence presented for assessment is my own unaided work. • I have read the assessment regulations and understand that if I am found to have 'copied' from published work without acknowledgement, or from other candidate's work, this may be regarded as plagiarism which is an offence against the assessment regulations and leads to failure in the relevant unit and formal disciplinary action. • I agree to this work being subjected to scrutiny by textual analysis software if required. • I understand that my work may be used for future academic/quality assurance purposes in accordance with the provisions of the Data Protection Act 1998. • I understand that the work/evidence submitted for assessment may not be returned to me and that I have retained a copy for my records. • I understand that until such time as the assessment grade has been ratified through internal and external quality assurance processes it is not final.					
Signature:				Date:	16/12/2019

Personal Statement – Contributing to the Management of Change

LO 1 – Be able to plan for the implementation of change processes within an organisation

The NAS Director of Adult Services in conjunction with the Finance Director have been the senior project sponsors of a digitisation programme which has been underway across the UK for the past 18 months as outlined in the overview of the digitisation project (EV1) which aligns to the 2019/20 plan for the charity which included a mission statement to make it more efficient, effective and sustainable (EV2). It became apparent during this period that areas across the organisation were organised differently with finance and business support functions being delivered inconsistently with no clear segregation of duties. The resultant reporting hierarchies were complicated which was creating silo working and a lack of trust which according to Mindtools (2019) is not in keeping with the change ready culture. Furthermore, failing to establish linkage between the strategy, structure and processes were identified by the CIPD (2018) as being one of the key barriers to effective change.

It was as a result of the aforementioned internal drivers (LO 1, 1.1) as identified in the SWOT analysis I devised for Wales (EV3) that the leadership recognised that should the organisation fail to align its structures, systems and skills that the change initiative would fail to succeed (Society for Human Resource Management, 2019). The senior management group decided that in order for the organisation to be able to deliver a cohesive and efficient response to our stakeholders, that there was a need to restructure and appoint a Head of Commercial Operations who would have two work streams reporting into him/her (being Business Development and Business Performance) who would

provide a centre of excellence for core business functions across all areas of the UK (EV4).

The associated benefits of adopting this centralised model would be that strategic business plans could be made for the entire charity (thereby enabling informed business decisions for the future) and equipping the organisation to respond faster to change, whilst supporting streamlined ways of working and embedding consistency and continuity across the business support functions (LO1, 1.1).

The primary people impacted by the proposed restructure (LO1, 1.2) are those within the finance and business support functions. The other stakeholders included the regional Area Managers for Adult Services, frontline managers within the services supported by the business function (Stakeholder Mapping Worksheet refers – EV5) and external stakeholders, for example, Access (external systems provider).

When engaging the people within scope for the restructure, it was identified that change sponsors should work from the premise that people would be engaged from the outset in order for them to feel part of something as opposed to “having the change done to them” (Stern, 2017). This move away from the more traditional command and control techniques towards change been a creative and collaborative process (Forbes, 2019; Deloitte, 2016).

The communications plan (EV6) was formulated on the basis that this group would require regular communication across a variety of channels – a view held by Acas (2014) who extol the importance of communication being the key most important consideration when organisations are tasked with managing change. Effective communication strategies would provide affected staff with the assurance that opportunity existed for them in terms of development

opportunities and more diverse exposure to the wider business (LO 1, 1.3) with a view to supporting them through the first zone of the 3 zone Bridges Transition Model being: Ending, losing and letting go (process.st, 2017). This would require face-to-face consultation sessions as well as the planned Skype Group consultations and signposting to web based support – Q&A's, guidance through blogs and Sharepoint updates (EV7). Affected staff were invited to one-to-one sessions with the Area Manager and myself and they could elect to attend the meeting accompanied if they chose to (EV8).

It was acknowledged that in terms of required resources, there would be a need for a shared service centre to be set up and any barriers to flexible working be removed (eg: providing laptops) which was one of the components adopted in revamping the working practices of Christchurch and East Dorset Councils (CIPD, 2014a).

A change plan (LO1, 1.4 – EV9) and the aforementioned corresponding communications strategy were devised in consultation with the HR Director and Area HR Managers, following which, approval was sought from the Area Managers in each region (attached letter from my line manager refers – EV10). I mapped the corresponding timeline (Gantt Chart – EV11) to the implementation schedule. Thereafter, it was the responsibility of the Area & HR managers to lead on the messaging and their agreed components of the communication strategy locally.

LO2 – Be able to implement a change plan

As the implementation phase got underway in October, I became more active in driving the Wales agenda (LO 2, 2.1). I compiled an activities list of the admin support required locally that needed to be accommodated into the roles within the proposed structure (EV12) with an accompanying list of considerations for the project sponsors (EV13). These were fed back as part of the ongoing meetings between the project sponsors and Area/HR Managers, an example of the minutes from one such session attached (EV14). Job descriptions were drafted following input received (EV15).

Face-to-face meetings with myself and the Area Manager were conducted (LO 2, 2.2). Protecting the emotional wellbeing of these individuals was paramount and formal referrals to the Employee Assistance Programme for face time counselling sessions were offered (EV16) and individuals were signposted to the grievance policy (EV17) in the event that they felt aggrieved at any point during the process.

Albeit that this project has only been live for a matter of months, the organisation has made use of its digital platforms (through the weekly updates and blogs) to keep the workforce engaged in the digitisation process through regular opportunities to engage in 2 way dialogue which is supporting people acclimatising the change (LO 2, 2.3 – EV18), which is an approach that Marris (2017) states as being useful in guiding and supporting people through the change process whilst continuing to clarify the vision for the future. As the project unfolds, success stories will be uploaded onto Yammer and NASnet in order to instil a sense of control and competence amongst this group.(McKinsey & Company, 2016b).

A number of key challenges were identified during these meetings which would significantly impact the achievement of the milestones. These were reflected in a compilation document summarising feedback from local Area Managers during the consultation Meetings (LO 2, 2.4 – EV19). The primary concerns related to the feasibility of a wholesale change impacting 65 people across the UK and the associated risks that this would pose to the business during the transition phase. Given the fact that practically every major back office function would be impacted in some way, the reputational risks, potential logistical issues in delivering core services at a local level and the looming threat of key staff leaving the organisation without transferring the knowledge they had accumulated over the 18 months since digitisation commenced, posed a real concern.

A revised timeline was then devised (LO 2, 2.4 – EV20) and the formal restructure was paused in favour of an “engagement” process, wherein staff were encouraged to “own the effort” (Harvard Business Review, 2019) and have a hand in shaping the future of the business and support function. This has seen the process evolve from a more traditional top-down mandated change to one akin to the Nudge Model (where clarity, reciprocal communication, transparency and collaboration are the techniques being utilised to foster staff buy-in) (McKinsey, 2019) (LO 2, 2.3). During a meeting with affected staff, I proposed that each staff member consider volunteering for the focus groups that were being formed as the Wales team were at the forefront of the change as a number of them had been instrumental in piloting various parts of the digitisation project across the UK (2 staff subsequently volunteered their services – EV21).

A letter from my line manager is attached indicating that he is of the view that I have fulfilled his expectations in terms of my contribution to the implementation of this change (LO 2, 2.5 – EV22).

LO3 – Be able to assess the impact of change processes within an organisation

According to APM (2017), relating measures to the agreed vision and benefits at the outset of a change programme is key, however, given that this project is in the early stages of its implementation and is currently operating to a fluid timeline in order that the focus groups have the time and space to scenario plan and brainstorm ideas to guide this transition, it is not at the point at which measures of success can be evaluated (LO 3, 3.1) and the change team is accepting of the fact that as be measured over time and assembling a completed set of measures may extend beyond the end of the change programme itself (NHS, 2018) and facilitate a greater understanding of the trends in performance (Better Care Fund (NHS), 2015). This is largely as a result of the complexity of this project and the factors inherent to both the new roles within the structure and the infrastructure of the systems themselves (which in most cases still require reporting functionality to be inbuilt in order to track progress against KPI's). For example, when referring back to responses from Area/HR Managers contained within the Summary Feedback (EV19), the following points are made:

- The go live date of February 2020 is dependent upon integration between the HR reporting system and the rota planning system but due to ongoing issues with the developer, this has already been put back twice and linkage is integral to being able to provide the data to assess the impact of the change.

- The targets for mitigating future issues before they occur will be built based on the real-time business intelligence that these systems will provide (with people in the new business support roles being responsible for the evaluation and dissemination of this data).

In terms of further work required to embed the changes that have occurred thus far (LO 3, 3.2), there remain unanswered questions as to how the new roles will be designed to accommodate conflicting priorities, disparities in service offerings and headcount within areas amongst others (EV23). This will be addressed through the focus groups and in future consultation meetings with Area/HR Managers.

We have been advised that the DTP Programme will measure success in areas of engagement and how successfully the organisation adapts and transitions into digital working. A jump-off point for this will be understanding the drivers of the results of the engagement survey which is the tool that the (CIPD, 2014b) recommends for monitoring levels of trust in the organisation. The results of which were communicated to staff last month (EV24) which returned some damning statistics as follows:

- In response to the statement “I believe our senior management group will act on the results of this survey”, a mere 43% agreed. In their survey, McKinsey & Company (2016a) revealed that in a sample of employers undergoing transformations, 86% of executives reflected that they were of the belief they were modelling the behaviours of effective change but only 53% of employees shared this view.
- In response to the statement “Our charity manages change effectively (reorganisation of departments, changes to systems and processes)” – 37% disagreed.

- In response to the statement “I receive a good service from the Project Management Office” – 30% agreed. This is, however, unsurprising given that research has indicated that PMO’s have decreased in number since 2007 as there was insufficient evidence to support their effectiveness and they weren’t deemed to be supportive of an agile working framework (Cameron, 2015).

The survey did, however, return more favourable results in a couple of areas, namely:

- That the preferred methods of staff being kept informed were those that were being utilised as part of the Communications Plan ie: Emails from line managers (40%), Team Meetings with managers in attendance (38%), Internal Comms Emails (32%).
- In response to the statement “I feel that the Digital Transformation Programme is a positive change for our charity” – 53% agreed.

Each area has been tasked with completing an action plan to identify the areas that scored the lowest (EV25). The affiliated outcomes will be disseminated through the local area digital transformation champions (LO3, 3.3 - EV26) and pulse surveys will be conducted in early 2020 (as part of the monitoring measures included in the change plan) in order to gauge how progress has been sustained in these areas (Email from CEO refers – EV27).

In terms of my own effectiveness through this process (LO 3, 3.4), I feel that I have a solid understanding of the fundamentals for planning for change and the tools and methodologies to utilise (eg: SWOT, PESTLE analyses and the more popular models, eg: Kotter, Mckinsey’s Influence Model etc). In my view, the real value I have contributed thus far has been based on knowing the business and having a grasp of the operational issues within Wales. I have benefitted

from exposure to national stakeholders, having previously led on UK wide initiatives to review the pay, reward and recognition programmes so I have a developed network and relationships with people at all levels of the organisation. A key strength of mine is utilising my knowledge of people and their preferred communication styles which informs my approach in supporting them to understand the reason for change and their role in shaping the proposed structure that will support it (affirmed by my line manager – EV22). This links to the psychology of change principles included in the CIPD Profession Map which includes HR professionals ensuring that staff see the point of the impending change and having structures in tune with the change and people they respect modelling the behaviour required) - (McKinsey & Company, 2003). My development areas relate to the following areas within the Profession Map, however, my aim is that upon culmination of this change initiative, that I would have gained valuable insight and practical knowledge into both:

- How to assess a current and future organisation capability and readiness for change across a range of stakeholder groups
- How to assess which levers will achieve and sustain change

A recent HBR article discusses the contemporary viewpoint of all management being change management and that business leaders should identify change as being the essence of any management job and not an occasional disruptor (Harvard Business Review, 2017) and in my view, embedding this mindset by managing both upwards and downwards is fundamental to my role if Wales is to fully embrace change and reap the resultant benefits of a digitised environment.

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Digital Transformation Programme

Room Bookings

[City Road, London](#)
[Bristol Office](#)
[Glasgow Office](#)
[Services](#)
[Cardiff Office](#)
[Croydon](#)
[Diamonds Business](#)
[Centre](#)
[Godalming](#)
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Our charity is currently undergoing a Digital Transformation to move our outdated and varied paper based systems and processes into the digital age.

What is the Digital Transformation?

It's our charity's largest change programme, investing in technology to help automate our processes and systems to make us be as efficient as possible and ensure the future of our charity for years to come.

The programme will provide us with tools to enhance our quality and compliance, make us more efficient and improve our ability to monitor and report on our work including our rota, care management, finance and people.

At the moment these key ways of working are not consistent across the organisation and require a large amount of manual work which is not manageable for a charity of our size.

Why are we investing in a Digital Transformation?

It is essential to upgrade our core tools and systems to ensure we can continue to transform the lives of autistic people for years to come.

The new digital systems will reduce the need for paperwork, provide us with the tools to enhance our quality, compliance and make us more efficient, improving our ability to monitor and report on our work.

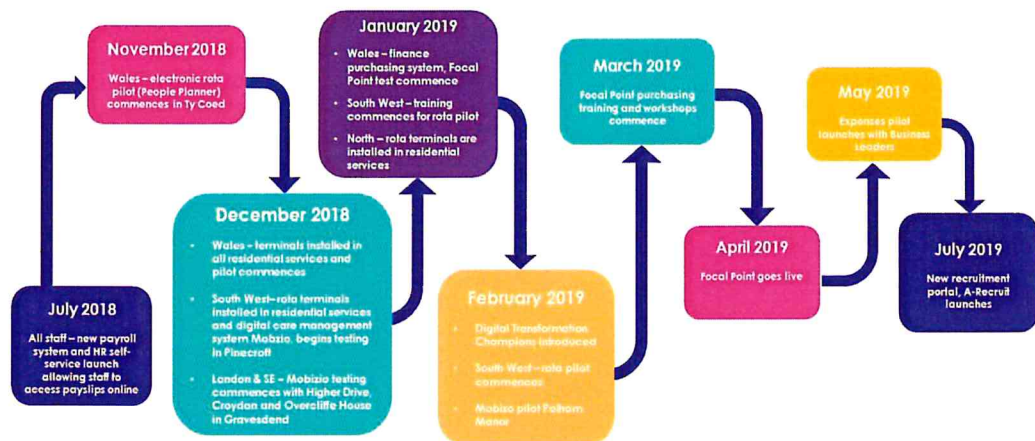
Investing in new digital systems will mean spending money in the short term, but the long term savings will cover our initial costs and save us money

More information about the programme, can be found in the [FAQs here](#) or latest [programme news updates here](#).

We are currently working on the below four projects, for more information click on the specific topic below:

- [Electronic rota management](#)
- [Digital care management](#)
- [Financial management](#)
- [HR and payroll](#)

Milestones to date



Digital Transformation Champions

To help make the transition to our new digital tools and systems a little easier, we've introduced Digital Transformation Champions, [click here to learn more](#) and find resources from our Champion meetings.

For additional information about the programme, contact your Digital Transformation Champion, email the Digital.Transformation@nas.org.uk team or the Project Lead below.

Programme Manager: George Stevens



2019/20 Plan

To create a society that works for autistic people

We will transform individual lives by...

Running the best social care services and schools that we can.

Opening our new Centre in Belfast.

Updating our website to inform, support and connect millions of autistic people and families.

Giving thousands of people specialist advice through our helpline and training, for example, EarlyBird and Teen Life.

Supporting autistic children in mainstream schools through our Cullum Centres.

Coordinating our 117 volunteer-led branches to provide autistic people and families with information and face-to-face peer support.

Supporting autistic people into employment through our Enterprise Campus and our Moving Forward service in Scotland.

Diagnosing 200 people at our Lorna Wing Centres.

We will change society's attitudes by...

Improving the public understanding of autism.

Getting businesses involved in Autism Hour and signed up to our Autism Friendly Award.

Advising production companies to make sure autism is portrayed accurately on TV and film.

Running autism-friendly performances allowing autistic people and their families to go to the theatre.

Changing government policy so that it benefits autistic people across the UK.

Recognising exceptional autism services through our Autism Accreditation programme.

Increasing the number of education professionals being trained by the Autism Education Trust.

Increasing autism training for professionals in Northern Ireland.

Continuing to educate professionals through Network Autism.

We will make our charity more efficient, effective and sustainable by...

Rolling out new technology, including new IT equipment and rota and care systems, as part of our Digital Transformation Programme.

Reviewing our membership programme.

Starting local governing bodies at each of our schools.

Innovating in how we fundraise and raise public awareness.

Sticking to our budgets and targets.

Continuing to invest in our people through high-quality learning and development.

And we will plan new work for the future by...

Developing new programmes of work to help autistic people and families with the most crucial challenges they face in life.

SWOT analysis

Strengths

- Acceptance by Area Leads of the need for roles to adapt in line with increasingly digitised processes
- Pilot team for digitisation project based in Wales with an 18 month lead time on other areas
- People Planner leads linked in with operational managers

Weaknesses

- Retention of key staff
- Duplication of work
- Morale in certain areas
- Propensity of business/ finance teams to upskill in order to fulfil these roles
- Logistical challenges posed by servicing multiple areas from a central hub
- Leadership skills and confidence

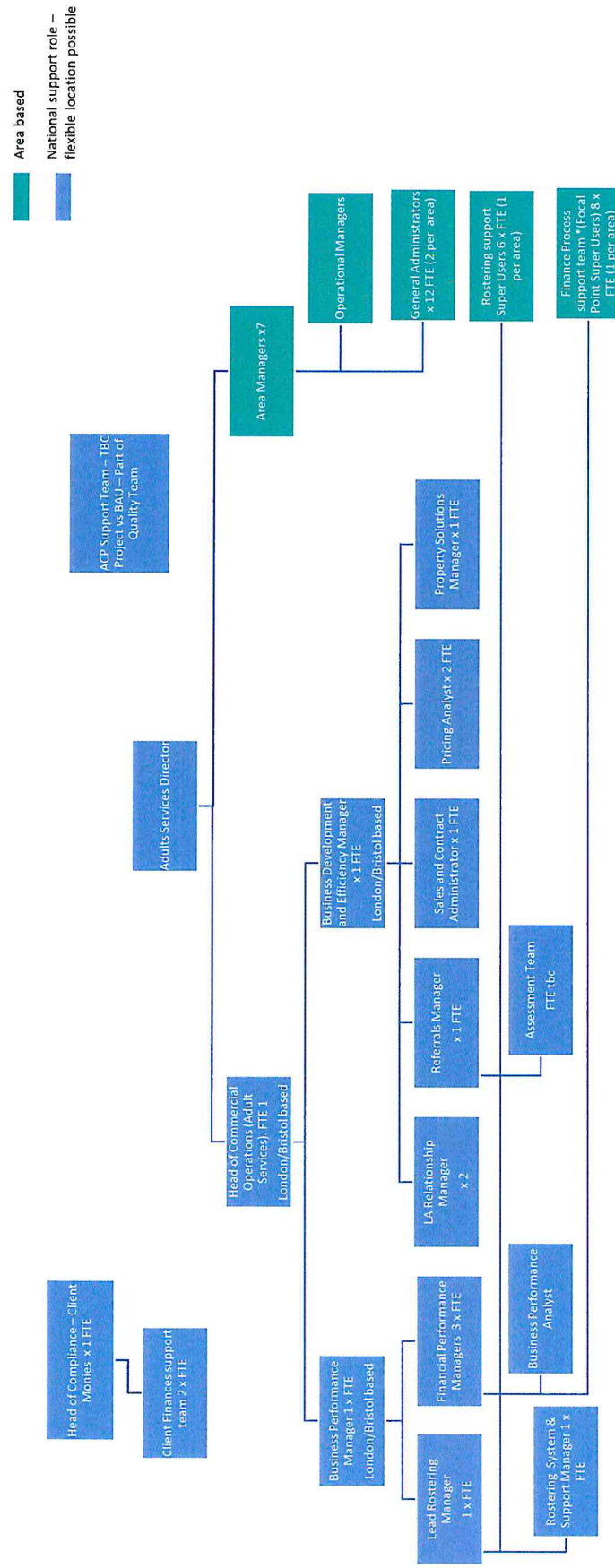
Opportunities

- Increased opportunities to leverage skills across areas
- Ability to standardise processes across the UK
- Consistency of service offering
- Efficiencies to be gained through more effective application of resources
- Automated reporting systems and timesheets
- Increased transparency and oversight through streamlined reporting hierarchies
- Ability to react faster to market demands (i.e. placement referrals and tenders)

Threats

- Timing is questionable given the uncertainty regarding the full impact of the digitisation project
- Rollout approach to digital transformation and the numerous launches that have resulted in a return to a UAT environment
- Reputational damage to brand
- Impact of no deal Brexit coinciding with a shortage of supplies and a new finance/ procurement system & process

EV 3 1/1

 $\frac{1}{6}$

People Planner roles

People Planner Manager

- Define business reporting needs
- Provide analysis and to operational managers, financial performance team and pricing team on staffing utilisation, staffing costs etc
- Contract compliance reporting

People Planner Support Manager

- System user expert (non- admin level)
- Build rota's
- Build reports
- Maintain the system – new starters, leavers, new rate cards etc

People Planner Super Users

- Provide system support to users
- Production of reports for all stakeholders
- Payroll reconciliation and analysis eg rota efficiency support to managers

Business Performance roles

Business Performance Manager

- Report consolidated adult services position
- Identify trends

Financial Performance Managers

- Provide direct support to operational managers as to financial performance
- Budgeting and forecasting
- Profitability reporting
- Highlighting risk and support operational managers in resolving areas of risk

Business performance analyst

- Producing reports for use by the Financial Performance Managers utilising data from PP, income reports and expenditure reports
- Corporate card, petty cash and staff expenses audits

Business Performance roles

Finance Process support team

- Focal point super users
- Supporting managers in the use of the various financial systems
- Raising PO's / goods receipting of orders
- Expenditure processing
- Corporate card reviews / petty cash returns / expenses reviews

Business Development and Efficiency roles

Business Development and Efficiency Manager

- Identify areas of growth opportunity through tenders
- Support operational managers to resolve inefficiencies
- Support the development of business cases for internal approval / investment

LA Relationship Managers

- Manage relationships with key purchasers
- Identify areas of growth and opportunity for development and maintain current business
- Market insight
- Fee negotiation

Referrals Manager

- Delivery of all assessments supported by assessment team
- Management and analysis of referral pipeline

Business Development and Efficiency roles

Property Solutions Manager

- Develop network of housing providers
- Source appropriate property solutions to support operations

Pricing analysts

- Developing unit cost / standard approach to all pricing
- Fee breakdowns to assist fee negotiation
- Pricing of new business
- Support profitability analysis

Sales and Contract Administrator

- Setting up new clients for billing
- Processing changes to support packages for billing
- Provide logistics support to LA Relationship Managers and Referral team (arranging meetings, booking rooms, travel etc)
- Issuing contracts (with support from NAS Central Contracts team)

Stakeholder Mapping Worksheet

Stakeholder Influence/Interest Matrix

For each key stakeholder, characterize them using the following stakeholder influence grid.

Influence	High	Keep Satisfied	Key Players
	Low	Minimal Effort	Keep Informed
		Low	High
		Level of Interest	

Stakeholder Grouping

Using the Stakeholder Influence/Interest Matrix, complete the table below. This will help determine stakeholder's grouping for change communications.

Stakeholder Name	Influence Level	Level of Interest	Stakeholder Grouping
Finance & Business Support teams	High	High	Keep satisfied
HR Team	High	High	Key Players
Autistic colleagues	High	High	Keep informed
Area Managers	High	High	Key Players
Business Leaders	High	High	Keep satisfied
L&D Team	Low	Low	Minimal effort
Residential / Day Service Managers	Low	Low	Minimal effort
IT colleagues	Low	High	Keep informed

Following a working party comprising the HR Director, Internal Communications Manager and the Area HR Managers (including myself) which was convened in September 2019, the following communication strategy was devised to support the implementation of a proposed new structure that aligns more closely to the move towards a more digital way of working, whilst managing the messaging of the restructure in a manner that ensures maximum support to impacted staff members and the protection of jobs.

We want to create a centre of expertise in Adult Services to make business decisions for the future and assist in making the organisation efficient, strategic and responsive to change. In order to achieve this, the HR managers (under the remit of the HR Director) have been tasked with supporting their local areas in the delivery of this strategy which has been devised to support the transition the seven regional Adult Services Finance and Business support teams into two central teams.

Internal Communications Strategy

Aims.

- Support successful implementation of new structure and associated digital ways of working
- Reduce any potential for anxiety, confusion or uncertainty for internal and external stakeholders
- Reduce any potential reputational risks for our charity that could arise
- Reduce and manage the risk that the Adult Services Finance and Business support teams and re-organisation or restructure reduces staff engagement with the Digital Transformation Programme, our charity or staff member's particular workplace

Objectives

- To support internal stakeholders to understand what changes are being suggested and/or made
- To support internal stakeholders to understand what alternatives are available to them
- To support affected staff to participate as effectively as possible in the consultation
- To support teams to fulfil their roles within any changes that are suggested/made
- To keep all stakeholders informed at the appropriate stages

Target audiences

- Adult Services Finance and Business support teams, including staff on career breaks and long term sick
- Autistic colleagues affected
- Adult Services Area Managers
- All staff in Adult Services
- Business leaders / Trustees

Reputational risks

Negative responses to the review and consultation which may be expressed to externally and which inhibit the successful review process. Likely objections/misunderstanding:

- Changes result in change to (or reduction in) responsibilities for some staff
- Interim changes needed cause confusion
- Perception that changes do not improve efficiency, or create new inefficiencies
- Staff do not understand why the changes have been made
- Staff do not understand their role within the changes
- Staff do not feel supported in their role within the changes
- Staff do not feel consulted with
- Digital Transformation Programme becomes associated with restructures

Mitigation.

- Consistent and timely communications to all stakeholders around agreed key messages
- Early communication with and involvement of all SEH staff, including agency staff
- All communications to staff to emphasise that the minimising of disruption to the people we support
- Communications team working with the project team to advise on the timings of communications
- Training and guidance available to staff to support their use of new technology
- Consider this change in line with all communications associated with the DTP



Communication mix (channels).

- Affected staff: Adult Services Finance and Business support teams – face to face meetings, emails, telephone calls, letters
- Adult Services Area Managers – face to face meetings, emails
- Central Finance Team – face to face meetings, emails
- All staff in Adult Services – Email from Area Manager, local newsletters, email
- Business leaders – email
- HR managers and team – face to face meetings, emails
- All staff – weekly Staff Update, all staff email, NASnet, quarterly newsletter, National Staff Forum
- Trustees – Trustees Update

Key messages

- Our charity's adult social care services are divided into seven areas, each managed by an Area Manager. Currently, each area has its own Finance, Business and Administration support team, which the Area Managers is responsible for.
- The current structure means we cannot plan and make strategic business decisions for the whole charity
- We want to create a centre of expertise in adult services to make business decisions for the future and help make us more efficient, strategic and responsive to change
- This structure and systems will also have the added benefit streamlining ways of working
- The aim of this proposal is not to make financial savings, rather it is to create a structure that will achieve consistency and continuity
- As part of this process, you will also have an opportunity to request an individual consultation meeting with HR
- We will make sure that staff are able to ask questions throughout the process and are updated as regularly as possible
- Throughout this process, it's our aim to find ways to avoid redundancies

Measurement / Ongoing monitoring

- Dedicated Q&A section and shared feedback group set up on Yammer and Share-point
- Adult Services Director chairing bi-monthly sessions with senior sponsors to troubleshoot issues as they arise
- Status updates to be relayed through Staff Communication Network and the Autistic Employees Forum



Comms tools / activity	When	Who	Notes
Brief HR Managers	10 Sep	HR Director	Brief that Internal Communications will own narrative and communications.
Invite Area Managers to a meeting	20 Sep	DP	
Agree comms plan for internal stakeholders	10 Oct	HR Director	
Meeting with Area Managers	11 Oct	Area HR	HR to brief Area Managers on change happening and their role in this process. (Including JDs, papers, structure, timeline and comms.)
Draft FAQs	WB 30 Sept	Area HR	
Develop plan/materials for supporting autistic colleagues within this process	Ongoing	DP	
Area Manager invite Business and Finance teams to a meeting	23 Oct	Area M	Use copy for invite.
Local pre-consultation meeting with directly affected staff in area	24 Oct	Area M	Use script. Call/face to face/Skype.
Letter to all affected staff inviting to consultation meeting	WC 28 Oct	Area HR	Share template
Meeting with affected staff – consultation letter and consultation docs given	28 Oct	Area M and Area HR	Including deadline for feedback, organogram and JDs
Email/letter sent to any staff who could not attend the consultation meeting	WC 28 Oct	Area M and Area HR	Including deadline for feedback, organogram and JDs
Email to business leaders/other close teams informing of consultation (with request for cascade to teams where appropriate).	WC 28 Oct	FG and Area M	
Meeting with Central Finance Team – roles not under consultation, but their roles and responsibilities are changing	WC 28 Oct	KE	
Meeting with IT Team – roles not under consultation, but responsibilities may change	WC 28 Oct	NS	
Feedback deadline	8 Nov	HR	
Circulate revised proposal	22 Nov	HR	
Job description session	29 Nov	KE and HB	

Total words = 796

Kelly Evans' blog – Digital Transformation update

How to stay updated

Share your stories

Blogs

Yammer

Publications

The Spectrum

Your Autism Magazine



21/06/2019

As you all know, our charity is currently undergoing a [Digital Transformation](#) to move our outdated and varied paper based systems and processes into the digital age.

I know that many of you will have different levels of understanding about the programme depending on how much involvement you may have had, so as the Project Sponsor, I'm using my blog to answer some of your questions.

What is the Digital Transformation Programme?

It's our charity's largest change programme, investing in technology to help automate our processes and systems to make us be as efficient as possible and ensure the future of our charity for years to come.

The programme will provide us with tools to enhance our quality and compliance, make us more efficient and improve our ability to monitor and report on our work including our rota, care management, finance and people.

At the moment these key ways of working are not consistent across the organisation and require a large amount of manual work which is not manageable for a charity of our size.

What's changing?

From	To	What this means
Rota management		
Paper rota and signing in and out on paper	Online rota and clocking in and out with a fob	Our new tool, People Planner, will standardise rostering across our charity. Not only will this make it easier for us to report on our work, it will also allow staff to check the rota at any time from any device. Plus it will help managers, reducing the time it takes to fill shifts and cover sickness.
Care management		
A mixture of online and paper based care records.	One online care system where all care records are saved.	Our new tool, Mobizio, will make it easy for staff to access all the information, forms and records relating to a person they support, from a simple to use tablet device. (This won't be changing for staff in schools and student support.)
Human resources (HR)		
Standalone HR systems	Integrated HR systems	HR Self-Service has replaced My HR View and A-Recruit will replace Job Train. While these HR and job recruitment tools will be quite similar to our old tools once fully rolled out, they will have the added benefit of linking to all our other new tools, meaning staff will be paid for the hours they work, instead of filling in additional overtime forms, and we can more easily make them single sign on (you only need one password to access all the tools).
Finance management		
Standalone finance systems and paper based processes	Integrated online finance systems	Our new purchasing system Focal Point has replaced Proactis, and Workplace Expenses has replaced a paper based process. Like our new HR systems, these new tools are fully integrated with all our other new tools. They also have linked tools which will enable our finance teams to automate processes such as the uploading of invoices (this will save a huge amount of time for the team who currently process 40,000 invoices a year!)

Why are we investing in a Digital Transformation?

It is essential to upgrade our core tools and systems to ensure we can continue to transform the lives of autistic people for years to come.

The new digital systems will reduce the need for paperwork, provide us with the tools to enhance our quality, compliance and make us more efficient, improving our ability to monitor and report on our work.

Investing in new digital systems will mean spending money in the short term, but the long term savings will cover our initial costs and save us money.

When will it be complete?

Given this is the biggest project our charity has undertaken in its 60 plus year history, there has been a number of challenges and delays, which I am sure you are aware of.

This has included a change of Project Manager, delays in supplier delivering terminals and additional testing.

Over the last month, we have been reviewing the project timeline with the supplier and the expected completion date to push through to the end of the project.

Once we have confirmed the new project timelines, we will share this with you all.

What progress have we made?

While it may feel like progress has been slow, there have still be plenty of milestones delivered including:

- IT: we have been setting up tablets and laptops to be rolled out with our new systems on them. They've also been updating network and Wi-Fi upgrades

across the country, and have supported installing 'terminals' across Wales and the South West, for staff to clock in and out as part of the electronic rota management project.

- **Financial management:** our purchasing system Focal Point is now live, and we're monitoring staff feedback. Our new Expenses system has been launched to Business Leaders and SMG and we are planning the roll out to all staff.
- **HR and payroll:** we are working getting HR Self Service ready to record staff holidays, and our new recruitment portal will be launched at the beginning of next month.
- **Electronic rota and digital care management:** the detailed rota roll out plan by region has been developed and testing strategy is currently being developed.

How can I keep updated about the Digital Transformation Programme?

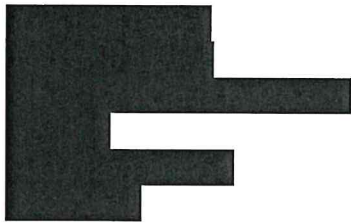
To make sure you are up-to-date all changes associated with the project, you can keep up to date through the below ways:

- **Staff Update:** a weekly digest email sent by Internal Communications each Friday.
- **NASnet:** news stories published as they happen and included the Friday update, Frequently Asked Questions, User Guides, specific project information.
- **Email:** communications will be sent directly to your NAS email about the Digital Transformation when impacted e.g. rota training to take place.
- **Staff briefings:** your manager will share updates with you they have received from the project team.
- **Digital Transformation Champions and Staff Forum Reps:** a local source of information for staff helping keep your service informed, sharing messages and pointing staff in the right direction to find information when they need it.

If you have any questions about the Digital Transformation, please email Digital.Transformation@nas.org.uk or talk to your Digital Transformation Champion or contact me on Yammer.

Thank you all for your patience and understanding while we are undergoing our Digital Transformation, and to those involved, thank you for your ongoing support helping to revolutionise our charity.

Private and Confidential



24 October 2019

Dear 

Consultation meeting: Adult Services Business, Finance and Administration review

I am writing to invite you to attend a meeting to discuss a review of our charity's Adult Services Business, Finance and Administration structure. The meeting will take place as follows:

Date: Monday 28 October 2019

Place: Group conference call or or Second floor Lanacaster house, 106 Maes-y-coed road Cardiff, CF14 4HE

Time: 10.15am

If you are unable to attend face to face, you will have the option to dial in. The conference call details are:
Dial in; 0117 403 3297 / Pin 2424#

Please can you confirm your attendance to Leanne Aitken Leanne.Aitken@nas.org.uk and if you are attending face to face or via conference call. If you are unable to attend, please do let them know so alternative arrangements can be made to speak with you. You are welcome to be accompanied by a recognised trade union official or a workplace colleague.

The meeting will be chaired by, Hannah Barnett- Director of Adult services. Also in attendance will be Area Mangers, Area HR Managers, Kelly Evans- Director of Finance and Bethany Allum- People Director

I understand that this letter may worry you. If you would like independent support please do use our Employee Assistance Programme. You can contact the programme on 0800 716 017. The access code is 72942.

Please do not hesitate to contact me on Nick.Haake@nas.org.uk if you have any questions.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Nick Haake'.

Nick Haake – Area Manager Wales

EV9 1/4

Change Plan – Business and Finance Restructure (Wales)

Created by	Leanne Aitken
Date	7 September 2019
Version	V1

Vision and Objectives
The NAS is proposing to move to one central team with national roles in Adult Services, which will enable this directorate to operate a specialist team with a centre of expertise who will be accountable for strategy planning and decision making, in partnership with the Area Managers. This structure will provide a model that facilitates Area Managers to focus on the key service delivery components of their roles within their regions. Currently, business and finance support roles are dispersed across Adult Services in the UK, so the new structure will aim to have single points of contact in Adult Services with clear lines of accountability. Area Managers will continue to report into the Director of Adult Services, however, a new role (Head of Commercial Operations) is being created and this post holder will serve to guide and advise her in strategic decision making from an operational/commercial standpoint.
Activities to achieve objectives
See Gantt Chart attached
Business case (evidence-based - include data, benefits of change, gap analysis – difference between current and future states, issues and risks)
The charity's Adult Social Care Services are divided into seven areas, each managed by an Area Manager. Currently, each area has its own Finance, Business and Administration support team, which the Area Managers are responsible for. The current structure means the NAS is unable to plan and make strategic business decisions for the whole charity. It also means lots of the internal processes are not standardised, or have unnecessary extra steps which translates into duplication of effort. The organisation is seeking to create a centre of expertise within Adult Services in order to support business decisions for the future and enable the organisation to be more efficient, strategic and responsive to change. In order to achieve this, the proposal is to transition the seven regional Adult Services Finance and Business Support teams into two central teams, with two administration roles in each area. The introduction of digital systems that link together, will enable this change. This structure and systems will also have the added benefit streamlining ways of working, allowing Area Managers to concentrate on quality of care. The two teams will report in to a new Head of Commercial Operations, who will report in to the Director of Adult Services. The two central teams will be:

1. Business Performance Team This team will consist of a Business Performance Manager, a People Planner Team and a Financial Performance Team who will be responsible for budgeting, forecasting and highlighting risk and support, working in partnership with the Area Managers and their teams in resolving areas of risk. 2. Business Efficiency Team This team will support Area Managers and their teams to resolve inefficiencies, manage relationships with key purchasers, deliver all assessments supported by assessment team, set up new clients for billing, source appropriate property solutions to support operations and price new business. The aim of this proposal is not to make financial savings, rather it is to create a structure that will achieve consistency and continuity, which will allow our charity to make better decisions for the people we support. See attached SWOT Analysis attached for current/future state analysis.
People affected • Adult Services Finance and Business Support teams, including staff on career breaks and long term sick • Autistic colleagues affected • Adult Services Area Managers • Adult Services Residential / Day Service Managers • Business leaders / Trustees • HR Teams • L&D Teams • IT Colleagues
Scope of change This change involves employees fulfilling any finance or business support function with the NAS UK – L&D and HR teams are not in scope.
Roles Finance Director (KE) – project sponsor Director of Adult Services (HA) / HR Director (BA)– project managers Team members: Area & HR Managers London & South East, South West England, Central England, North England, Wales, Scotland; Internal Communications Manager, Operations Manager
Communication strategy (attach communication plan, list of change champions) See Communication Strategy attached. Change champions: (CG) Area Manager North (NH) Area Manager Wales (MP) Area Manager South West

Commented [FG1]: Name may change

(PJ)	Head of Adult Services Scotland
(JB)	Area Manager Central
(ND)	Area Manager London & South East
Support to be offered	
- All impacted staff will have the opportunity for a face-to-face consultation with local Area HR Managers with the offer to be accompanied by a recognised trade union official or staff member. - Formal referrals to be made available for the Employee Assistance Programme (and the option of face-to-face counselling sessions as opposed to telephonic ones. - Later addition: The option of deferring the commencement of the consultation process was introduced in order that affected staff be afforded an opportunity to engage in focus group sessions in order to have a hand in devising and scoping how the new roles will look as well as contributing to the transition plans for centralising functions currently administered at a regional level, - People Planner Pilot team in Wales, to conduct bi-monthly Skype troubleshooting sessions.	
Timings and milestones	
See Gantt Chart attached	
Resources required including cost	
- FAQ section to be made available through weekly newsletters (Internal Comms). - Pilot team for People Planner (based in Wales) to block time away from UAT to attend interviews and support on-boarding initiatives for those securing roles within the new structure. - External trainers (Access) to conduct bi-monthly webinar sessions (cost built in to existing Service Level Agreement). - Securing the floor-space and accompanying workstations within one of the NAS admin hubs (London or Nottingham identified) to house this newly configured service centre and/or consider whether there is a need for dedicated desks. - Requirement for issuing laptops to team members currently working from desktops to facilitate remote working (£1,500 pp for 6 people in Cardiff).	
Monitoring activities	
- Developing a resilience to change: The DTP Programme will measure engagement through the revision of staff engagement and pulse surveys utilising the data generated in the October 2019 engagement survey as the jump-off point. - Regular reviews of the build of information in the systems to ascertain data accuracy against agreed contract management support. - A live Q&A section and shared feedback group will be set up on Yammer and Sharepoint. - The Adult Services Director will chair a bi-monthly session with senior sponsors to troubleshoot issues as they arise. - Regular status updates / review of previous action plans to be a standing agenda item at the Staff Communication Network and Autistic Colleague Network sessions.	

Success Measures
Having an integrated solution that provides service managers with a system that has the ability to digitally manage the data relating to the operational management of their services and remove duplication of effort whilst supporting the establishment of targets and mitigating future issues before they occur through enhanced business intelligence and real-time information, including: • A functioning rota-planning system that logs when people start/leave a shift • An automated timesheet system (generated from People Planner hours logged) • System generated management reports (budgeted hours to staffing ratio, incident reports)

Julie Thomas
UWTSD

€ 010 1/1
National Autistic Society Cymru
2nd Floor / 2il Lawr
Lancaster House / Tŷ Lancaster
106 Maes-y-Coed Road /
106 Ffordd Maes-y-Coed
Heath / Y Waun
Cardiff / Caerdydd
CF14 4HE

Tel / Ffôn: 029 2062 9300
Email / Ebost: wales@nas.org.uk

15 November 2019

Dear Julie

Summary of Leanne Aitken's Contribution to the Planning of the Ongoing Change Project

The organisation has recently commenced with a review and potential restructure of its back office support functions. This follows an ongoing digitisation programme which encompasses a change to the way in which the organisation is organised to deliver the provision it provides to the people we support and touches on various key operational processes, including:

- Rota planning
- Invoicing
- Incident reporting
- Timesheets and annual leave

Leanne is the HR lead for Wales and has been involved in the initial discussions and scoping exercises, update meetings, communication meetings and supporting staff during group skype meetings and individually. This is a national initiative so Leanne's role has included supporting me in establishing what the impact for Wales will be for the 6 staff that were identified as been in scope and we conducted an exercise wherein we produced an activity list of tasks performed across this team and sought to identify where the gaps would be if we were to (a) potentially lose some of these people and (b) what tasks would still need to be performed at a local level once the business and support functions were consolidated into a central hub.

Kind regards



Nick Haake
Area Manager - Wales

EVII 1/1

Gantt Chart - Business Support Function Restructure

[illegible]

EU12 1/1

Wales	In an attempt to avoid a scenario where there is a single point of failure if a team member resigns or is away for an extended period, I would propose that whilst there is a nominated SME for Focalpoint, People Planner and ACP, that the remaining support function members are skilled in working across systems. The 3 super users would have responsibility for being the primary point of contact for their allocated services and escalate any complex queries to the SME where required (whilst working collaboratively on larger projects). The tasks for allocation identified below could be split across these 4 posts.		
Function	Admin support needed in the new structure for your regions	How many administrators are required?	Any other comments
	Total		Is there a restriction of licenses that needs to be considered?
Admin support for SMT x 1	Provide support & information to SMT members (projects, point of contact for actions generated at SMT meetings, compilation of data and reporting matrices that supplement these actions) General support & mentoring to services Troubleshooter Supporting other meetings/process (Managers Meetings, Staff Forums) ensuring meetings are serviced correctly (minuted and actions followed through on) Support to QAM: Service monitoring compliance - data collation (ie: supervision rates) Project specific support (ie: surveys and benchmarking analysis for bespoke interventions eg: registration of workforce under Risca, wellbeing initiatives) Annual audit (follow up on actions set by QA Manager) Financial safeguarding system (central investigations) Support tender work, manage on-call Manage on-call Manage high risk data/situations/manager compliance/ performance		There would be a need for the addition of one of the admin support roles to decompose NEBOSH and Risk Assessment training as the loss of NEBOSH competency across services would result in reduced compliance, scrutiny, operational support, complex Risk Assessment support and training expertise. Area Health & Safety Coordinator (HSE) Co-ordinator of H&S activities/Comms Co-ordinate Local Assessors
Senior Operations Manager x 1 (SMT Member) Operations Support Officers x 2	General Processes: General support & mentoring (support IT literacy performance) Trainer/troubleshooter Loading of invoices and troubleshooting issues regarding unapproved or rejected invoices, assigning T-codes etc Support submissions of corporate cards/follow-up Manage submission/running of petty cash system Expense Reviews - administer checks/auditing submissions & manager compliance Administrational support for payroll issues, banking and financial compliance for supported individuals People Planner Processes: Managing regional rostering activities Local building of rotas Monitoring People Planner (exporting/reporting to SNRS; monitoring/alerting SNRS) Allocating new starters/leavers System specific support/training Reconciliation of People Planner Inputs v Payroll Rebuilding rotas (new & amended packages) Access Care Planning Pro-active monitoring and reporting on system performance Proactively managing RAG issues tracker Forward planning and tracking of day-to-day & week-to-week activities/usage Support to staff teams re: rollout of each new process within ACP Uploading of support plans and medical information for the people we support		Operations Support Staff: - Supporting the Integrated System - To roll out wider integration - Managing change Person Spec: * High level IT literacy * Troubleshooting/problem solving * Mentor/training * Support 7 services each (21 to cover) * Some specialism * Monitoring/reporting/comms abilities * Cover for each other The operations manager and officers will support the SMT to roll out the integrated system and manage change over the next 2 years. It is expected that the general processes and people planner processes will become more efficient and therefore require less input from these staff. However, as these systems become more efficient, there will be an increased workload for the access care planning roll out.

EU15 1/1

Wales	Comments on structure	Questions / queries / considerations
	Centralising business support and finance at this juncture runs the risk of losing staff who are best placed to play a role in embedding and integrating People Planner over the next 6/8 months. Following which, there should be greater efficiencies to be gained, which will enable the rotation of these staff into roles with an ACP focus. For a change management perspective, the gains made during the trial period of People Planner has relied heavily on the relationships and experience of regional business support staff and the service that they have been able to provide to managers/staff teams over the past 6 months. The ability to provide real time solutions and troubleshoot issues as they arose (some of which were managed in situ, in services) will be difficult to replicate from outside the area in the early stages and could create problems in gaining manager buy-in to these wholesale changes to the operating process. Costing day and outreach packages and linking with commissioners locally is key to sustaining relationships and connections with Local Authorities and there is a risk that the strong links currently in place with commissioners may be compromised if this aspect is managed centrally. Loss of local oversight and scrutiny of budgets in an area where operational managers lack the expertise, knowledge and financial insight to maintain daily control over support hours, service budgets and new business development costings. Loss of service compliance and monitoring processes for regulated activities under the new RISCA Framework may lead to a direct impact on service performance, measures and senior management oversight.	
	People Planner Super Users x 6 / Finance Process Support Team x 8 (tasks).	My understanding is that 1 x People Planner super user and 1 x member of the finance support team (Focalpoint specialist) be based in area, my preference would be that these people fulfil a generalist role across allocated services (and lead on larger projects and address more complex queries in their areas of expertise (eg: People Planner/Focalpoint) - could this be an option?
	Co-ordination and communication process of the Business Development and Efficiency Manager's direct reports / segregation of duties.	How will all the moving parts link up through the course of a tender, for example? (eg: co-ordinating the variables involved in a tender submission and driving the process against the allotted timeframe) and how would work be prioritised in the event of multiple RFP's with conflicting timelines? Would there be merit in incorporating "primary regional liaison" responsibilities into one of the admin roles and that staff member would be the contact point in respect of referrals, tender applications, assessments? Manager capacity is an issue currently - how could we ensure that any requests for deliverables by the centre is managed so that reasonable response times are factored in (ie: would there be some type of basic agreement that would outline expectations at the outset)?
	Scoping / limiting the expanse of Super User and Support Team roles.	During the first 6 months following the restructure, would it be possible to limit the scope of the role to include activities that focus on ensuring optimal support is delivered to services locally as opposed to incumbents having cross regional responsibilities?

E U 14 1/2



Area Managers & HR Managers Conference Call Business & Finance Admin Confidential Notes

Date: - Wednesday 16th October 2019

Group members

Hannah Barnett	(HB)	Director Adult Services - Apologies
Bethany Allum	(BA)	People Director
Jayne Bowyer	(JB)	Area Manager Central
Claire Graham	(CG)	Area Manager North
Nick Haake	(NH)	Area Manager Wales - Apologies
Michelle Payne	(MP)	Area Manager South West - Apologies
Peter Jung	(PJ)	Head of Adult Services Scotland
Sarah Chivers	(SC)	Operations Business Manager
Dina Patel	(DP)	HR Manager
Maria Crooks	(MC)	HR Manager North
Dawn Allen	(DA)	HR Manager Central
Liz Morgan	(LM)	HR Manager Central
Leanne Aitken	(LA)	HR Manager Wales

- Currently trying to understand what current structure is and have concerns with challenges faced and volumes of work that needs to be done locally. New systems will change the way we work and there is a need to change how we work and this should be a service that is delivered to Area Managers allowing them to focus on operational issues. There is commitment to have the right resources during the transition period and it is felt it is better to this sooner rather than later. There is concern with uncertainty especially in areas where improvements have been made locally and services are flourishing and there are good people in post
- Unclear governance structure and there is a need for resources to manage impact and support for area managers to manage huge change. Area managers do not feel in control
- There could be a reputational risk with losing local connections where hard work has been put into building local relationship
- Concern of where people are going to be based
- Area Managers are on board with change but it is the timing that is of concern
- Concern where people have been developed locally and have invested time and money in who are over worked and implementing people planner will leave which we would wish to retain and also will go off sick. It is felt that this would be better in 6 months' time when people planner has been implemented. It is agreed that there is no good time but there is a bad time which is felt what this is
- It is felt that new systems might not reduce amount of labour required as more inputting would be required
- New systems need testing and they could be delays
- New finance systems for individuals being supported is very time consuming for finance administrators
- Area Managers are concerned without key individuals in area they will end up having to pick up work
- Finance Managers are picking up errors that have been made centrally with coding because of their local knowledge and do a good job
- In summary all on board and it is the future but feel moving to end point without having beginning and middle sorted. The preferred time scale would be in 6-9 months' time



**Area Managers &
HR Managers Conference Call
Business & Finance Admin**
Confidential Notes

- A decision on whether to proceed needs to be made on Monday 21st. A conference call will be arranged with area managers, HB, BA.

CONFIDENTIAL

Rostering Systems and Support Manager (Adult Services & Education)	
Division / Function: Adult Services TBC	
Reports to : Lead Rostering Manager	
Why	Job summary: This role is responsible for: • Maintaining the quality & integrity of the data in the rostering system • Managing data integration with other organisational and integrated systems • Building rostering models, including payroll and costing data, within the system based on user needs
What	Principal accountabilities • Expert of data architecture and design build supporting • Build and maintain additional or changes to existing services • Online staff portal • Service grouping for terminal usage • Data pushes into the ERP Solution modules • Shift design • Rules relating to shift management • Service types and subservice types • Build and amend rate cards • Build and maintain integration alerts • Manage accuracy of data & ensuring data is reconciled across NAS systems • Build reports to support system users & operational delivery • Maintain the system – new starters, leavers, new rate cards etc • Specify Role Based Access Control (RBAC) for the services and co-ordinate with IT to ensure access needs are met • Build and deliver training documentation to support new and ongoing support to Super Users • analysing agency usage and undertaking the usage reconciliation for month end processing Job descriptions only reflect 80% of a role, and are not an exhaustive list of duties. You are expected to carry out other activities that are within the scope of the role.
Competencies	<u>I am committed to making a difference</u> I commit to NAS aims, objectives and values. I display a positive approach in the way I work and contribute to the wider needs of the organisation and its stakeholders either directly or indirectly. At work I overcome difficulties, setbacks and pressure, to get things

done because I understand the impact of autism. I recognise and encourage commitment in others.		
<u>I cooperate with others to work safely</u>		
I understand the health and safety risks associated with my job and work responsibly with others to reduce them. I have a positive attitude to safety that causes me to care about the wellbeing of others as well as myself.		
<u>I gather and share knowledge</u>		
I seek and use information, knowledge and experience and create opportunities to share this with others. I look for new developments and keep up to date with issues which impact my work. I interpret, distil and disseminate information, in and outside the NAS, for the benefit of people with autism and other stakeholders. I manage and protect others' personal information professionally		
<u>I work in partnership</u>		
I build trust and partner with colleagues, other agencies and key people to facilitate the best outcomes for the NAS and/or people with autism. I overcome barriers and difficulties to bring people together and utilise relationships internally and externally to maximise service provision and/or the use of resources. I support colleagues to achieve our objectives		
<u>I develop new and existing activities</u>		
I promote, develop and grow NAS services and reach. I identify gaps in our activities and services, making the case for growth. I know when to share what works well and when something new is needed. I think creatively and practically about NAS activities and services. I seek best practice, building on others' new, alternative ideas and ways of doing things.		
<u>I adapt to changing priorities</u>		
I adopt a flexible, proactive approach to get the job done. I am responsive to change and recognise when tasks are urgent and/or important, taking appropriate action. I prioritise activities and know when to say 'no'. I deal positively with last minute changes and interruptions. I look for practical solutions and know when to find different ways to achieve an objective.		
Person specification		
Criteria which will be used in shortlisting and selecting candidates.		
Criteria	Essential	Desirable
Skills/Abilities		
- Ability to work effectively to senior stake holders with excellent organisational and planning skills - A problem solver	X X X	

- Proven ability to work within stringent timescales and manage their time effectively to ensure a high level of customer service is maintained - Able to work collaboratively as part of a team - Ability to rota coordinate/rostering - Ability to analyse complex data and present this in clear concise method to senior stakeholders		X X X X	
Knowledge			
- Systems knowledge - Rostering/rota know/shift design		X X	
Experience			
- Rostering/Rota coordinating - Building reports and using this information to plan and support key internal stakeholders - Auditing of systems data - Training on systems and creating manuals - Substantial experience of system administration of an integrated system in a large, complex organisation. - Proven experience of using initiative and creativity to resolve problems that are unpredictable, identifying practical and suitable solutions		X X X X X X X	
Education & Certification			
Educated to degree level or the equivalent experience		X	
Context	Interfaces		
	Internal - Area Managers - Adult services	External	
	Environment	Work Office Travel 20% Hours 35 per week with occasional over time	
	Scope	Financial n/a People: approx. 0 direct reports Resources n/a	
	Safeguarding responsibilities	The NAS is committed to safeguarding and promoting the welfare of all children and adults who use our services and as such	

EAP REFERRAL – GUIDANCE NOTES

EXTERNAL USE

Please see below the guidance notes for making an EAP referral.

WHAT DO YOU NEED TO DO?

STEP 1

Clarify the situation with the employee in confidence. Please inform them of the availability of the Health Assured Employee Assistance Programme (EAP) which includes:

- 24/7 counselling helpline and where applicable, structured short-term solution focused therapy.
- Advice and information for practical legal, financial and medical matters.

Questions to consider that may be helpful:

1. Do you need to discuss the situation with Health Assured first for guidance in approaching the matter?
2. Is the employee happy to receive a voicemail/text or could that result in someone, unintended, finding out about the support?
3. How is the situation impacting the employee?
4. When would be the best time for Health Assured to make contact, ensuring they are in a private and confidential space?

STEP 2

Complete the referral form with the employee, ensuring that explicit consent has been obtained.

Employee Consent

Health Assured is committed to the protection of all client data, and the transparent and informed use of the EAP Services. The referral process must be completed with the employee's involvement with clear consent to release information to Health Assured for the purpose of accessing support.

The referral process involves sharing personal contact details and case history which may include highly sensitive data (Special Category Data) including information about things such as health or sexual orientation. Employees are asked to confirm their consent to such by signing this form under the Employee Declaration section.

If an employee does not consent to the EAP Referral, please remind the employee they can contact the helpline on a self-referral basis.

Document Title	Grievance Management Policy
Reference Number	HR-0001
Version Number	V5
Date of Issue	12/11/2004
Latest Revision	30/01/2018
Distribution	All staff
Owner	Director of Human Resources
Policy Lead(s)	Area HR Managers
Department	Human Resources

Scope

This policy explains the steps to be taken by staff members and managers to ensure the successful resolution of grievances. It is the charity's policy to encourage communication between staff members and their managers to ensure that questions and problems arising during the course of employment can be aired, and where possible, resolved quickly and to the satisfaction of all concerned.

The steps are in place to ensure that our charity follows employment legislation and best practice when dealing with grievances.

Summary

The National Autistic Society recognises that from time to time, staff members may wish to seek redress for grievances relating to their employment.

The charity is committed to promoting a culture of openness and frankness that encourages parties to deal with issues informally and to find solutions that are mutually agreeable.

In situations where issues cannot be resolved informally, the Grievance Management Procedure provides an open and fair way for staff members to make their problems known and gives them an opportunity to resolve them before they become major issues.

Principles

- Grievances can often be solved by informal discussions or through mediation/counselling.
- Managers must act immediately. Allowing grievances to continue, without addressing them, may lead to more complicated problems.
- The process must be carried out in a reasonable manner and staff members should always be treated with dignity and respect

Definition

Grievances are defined as concerns, problems or complaints raised by a member of staff with their management, working conditions or relationships with colleagues. The charity recognizes that from time to time staff members may wish to seek redress for grievances relating to their employment.

Policy

The grievance policy and procedure is used when one or more staff members have a complaint or concern about:

- their terms and conditions of service and/or statutory rights
- action(s) the charity has taken or is contemplating taking in relation to that staff member
- another member of staff (such as but not limited to perceived actions of sexism, racism, bullying, victimisation, and harassment)
- problems with work relationships

The charity must ensure that all staff members with a grievance relating to their employment can rely on a process that will help resolve the grievance as quickly and fairly as possible.

The process should be carried out in confidence (unless otherwise agreed with the parties involved) and will not prejudice the aggrieved staff members current employment or future career prospects.

Some grievances may be of a sensitive or controversial nature and therefore a balance must be drawn between the need to preserve confidentiality and the need for informed discussion on the issues raised.

Related Policies

Investigation Policy

Review

The Grievance Management Policy will be reviewed every 2 years in consultation with relevant stakeholders.

Employee Assistance

There is a confidential advice, information, counselling and support service covering a range of topics including legal, financial, consumer and personal issues which employees may use. Contact details are available in your local office or on the Wellbeing page of the NAS Intranet.

Details of this service should be included in all correspondence to the employee.

Hannah Barnett's blog – changes to ways of working in adult services

How to stay updated
Share your stories
Blogs
Yammer
Publications
The Spectrum
Your Autism Magazine



Digital Transformation Programme



You've all heard me talking about the [Digital Transformation](#) but do you know our new digital systems will change the way we currently work?

Kelly gave a Digital Transformation Programme update in her [recent leadership blog](#). I want to talk about how these changes will impact us in adult services.

What's changing in adult services?

We know that lots of jobs are done differently across our charity, and many are paper-based. When we go digital, here is what will change:

1. **Online rotas:** instead of paper rotas on a notice board, hand written piece of paper, or however it may be done in your service, rotas will now be accessible on a computer or mobile device, at any time.
2. **Starting and ending shifts and no more paper timesheets:** instead of filling out a paper timesheet, you'll tap in and out of shifts using a fob or mobile device.
3. **Less paperwork:** instead of using paper forms to report incidents and or issue medication, this will be done on a tablet.
4. **Information about the people we support:** if you need to look up a record for a person we support, instead of rummaging through paperwork, you will be able to look it up quickly on a device.
5. **Request shifts:** permanent staff will be able to request vacant shifts online (for example if someone is off sick) before they are offered to agency staff.

Why are we going digital?

I'm so excited about going digital. I hope it's going to make life easier for everyone in adult services, reducing the time you spend on paperwork and filing, giving you more time for the people we support.

Plus, in the long run it's going to make us more efficient and allow us to monitor and report on our work. It will also support the governance of our charity – clearly defining roles and responsibilities and improving how decisions are made. It will also improve our access to up-to-date information which will improve the quality of our care, and mean we can continue to transform autistic peoples' lives for years to come.

When will it be changing?

As you will have heard me say before, the project has had a few delays due to testing and changes in project management. We now have a new project manager in post, and are working on our plan for the coming months. We will be communicating them with you as soon as they are ready.

Make sure to check your National Autistic Society email, read the weekly [Staff Updates](#), [NASnet](#) and talk to your manager regularly to keep up to date with all things Digital Transformation.

Questions?

If you have any questions about the Digital Transformation, please email Digital.Transformation@nas.org.uk or talk to your [Digital Transformation Champion](#), Staff Forum Rep or contact me on Yammer.

Digital Transformation Project: rota pilot launch in Wales

How to stay updated
Share your stories
Blogs
Yammer
Publications
The Spectrum
Your Autism Magazine



09/11/2018

This week marked an important step in the Digital Transformation Programme, with Ty Coed, one of our residential services a simple way of starting and ending shifts.

The pilot is the first step in our charity's plan to install a new electronic rota system for our care staff in adult services and res staff. The changes will help provide consistency for all staff across our charity, making starting and ending shifts much easier.

Colleagues at Ty Coed, Andi and Jordanna, found the new 'clocking in and out' system quick and easy to use. Click on the image below to see them in action.

The new rota system is one of the first phases of the Digital Transformation Programme. It will help the way staff are paid and reduce the amount of processing, giving everyone more time to spend on our jobs.

The pilot will be running in Wales so we can make sure the system works well before we roll it out further. Look out for more information about the pilot of the new rota system coming very soon.

If you'd like to know more about the Digital Transformation Programme, please email our new Senior Change Communications Officer, Paige Seller paige.sellers@nas.org.uk

To access the video, click on the image below.

- If you are using Internet Explorer the video will pop up and play.
- If you are using Chrome the video will download. Wait for the file to appear as a download in the bottom left of your screen, click on the arrow to open.



Leanne Aitken

From: Hannah Barnett
Sent: 19 November 2019 15:01
To: Adult Services - Area Managers; Adult Services - Registered Managers; Adult Services - Day Service Managers; Adult Services - Quality Assurance Managers; Adult Services - All Staff
Cc: Steven Hamer; Natalie Richards; Paul Ellis; James Lang; Lisa D'Costa
Subject: Digital Transformation: devices
Categories: CIPD

.....

Managers, please print this off and share with your teams who do not access their email on a regular basis to make sure all your staff get this message.

Hi all,

I am excited to let you know that we're delivering tablet devices to our services in Wales, London and the South East, North, Scotland and Northern Ireland in the coming weeks.

As part of the [Digital Transformation](#), staff in these areas will begin testing clocking in and out using the [Access Care Planning](#) application which feeds into [People Planner](#), where it is not possible to do this via a terminal.

This is to make sure we have checked all the new devices are working as expected and you all have the opportunity to try the new technology before we go live in early 2020.

- **If you work in a supported living, residential or day service**, your team will share a number of tablet devices across your service.
- **If you work in an outreach service**, you will receive your own tablet device.

You will all receive training, support and guidance to ensure you are all comfortable using the devices as part of the testing.

EV18 4/4

If you don't work in these areas, don't worry – you will receive your tablet devices very soon. The project team will keep you up-to-date when they arrive in your area.

Thanks everyone for your ongoing support as we test our new ways of working.

Many thanks,

Hannah

Hannah Barnett

Director of Adult services

National Autistic Society

07780696320

EV 19 1/4



Business & Finance Restructure 2019

Feedback from Area Managers

Area Manager feedback



- Need to build resilience to change
 - The DTP Programme will measure success for engagement and managing change, this will be addressed; reviewing staff engagement; using systems, (we can export reports on who is and who is not engaged)
 - We will also review build of information in the systems to ascertain data accuracy against agreed contract management support
- Area Managers/Registered managers responsibility and accountability need defining
 - Your current role profiles of responsibility and accountability will not change, however the way you manage the data relating to your service will through the ability to record digitally within an integrated solution.
- Will the roles and responsibilities and accountability be clearly defined e.g. where one role ends and another picks up.
 - The new roles presented clearly define responsibilities and accountabilities and will address where one role ends and another pick up. Job descriptions will help to clarify this further
- Will each area have designated finance performance managers? If so how will their time be split. There will be a reliance on collaborative working, how will this be managed?
 - It is proposed that there will be three finance performance managers to support across the regions. We can discuss how this will be managed on the Friday call

EU192/4

Area Manager feedback



- External impact. Has a list of stakeholders been identified? How will this be communicated
 - Stakeholders externally and internally have been identified and are being addressed accordingly
- Do we have a timeframe for People Planner and Select HR communicating with each other as this could affect additional hours of support that might be needed?
 - We have a plan that defines when we expect the system to go live which is dependant on integration between both systems. Whilst we currently have issues logged with the developer we are not advised that this timeline cannot be supported. Go Live February 2020
- Manager capacity is an issue currently - how could we ensure that any requests for deliverables by the centre is managed so that reasonable response times are factored in (i.e.: would there be some type of basic agreement that would outline expectations at the outset)?
 - We recognise our current ways of working impacts on managers capacity, however we know that the new ways of working will improve this. Delivering the digital solution will result in data only entered once, remove duplication and allow us all to understand what is happening in our services. We will build targets for mitigating future issues before they occur through excellent business intelligence that will be real-time information to help support our needs.

Area Manager feedback



- During the first 6 months following the restructure, would it be possible to limit the scope of the support to include activities that focus on ensuring optimal support is delivered to services locally as opposed to incumbents having cross regional responsibilities?
 - Delivering a digital solution enables regional and national responsibilities to be managed across all our services and needs. We would not require to limit this scope at the risk of delivering localised work arounds against opportunities that have been identified as a business.
 - We recognise that we have Services that must adhere to different governing bodies but these solutions will also take these into consideration and address these needs.
- Challenge of people under scope and what unique support will be especially when having shared roles
 - All staff impacted by consultation will be supported locally. Your role will be to ensure you answer any questions that you are able to within reasonable timeframes and address any concerns based on the information you have been provided.
 - We appreciate you will not be able to answer all questions, therefore a live Q&A page on NASnet will be devised to address any questions that staff may ask
- Lack of understanding of new system of invoicing commissioners? How far along the process are we? Currently a conflict of what is on contract and of what is being delivered
 - We know the digital solution will present us with many opportunities, however we will work with you to address these and agree a suitable action plan to manage this through an agreed timelines.

19 4/4

EU 20 1/1

FINANCE & BUSINESS ROLES				PEOPLE PLANNER ROLES				HEAD OF COMMERCIAL OPERATIONS			
Date	Action	Leads	Comments	Date	Action	Leads	Comments	Activity	Action	Leads	Comments
28th October	Call with AM's & AHM's to set out new plan based on below timetable	HB, KE, BA, AM & AHM	Meeting already held in diary	28th November	Call with AM's & AHM's to set out new plan based on below timetable	HB, KE, BA, AM & AHM	Meeting already held in diary	28th November	Call with AM's & AHM's to set out new plan based on below timetable	HB, KE, BA, AM & AHM	Meeting already held in diary
5th November	2 x regional calls (3 regions in each) with all members of Finance & Business, People Planner and admin	HB, KE, BA, AM & AHM	Invites to be sent from SC on behalf of HB	5th November	2 x regional calls (3 regions in each) with all members of Finance & Business, People Planner and admin	HB, KE, BA, AM & AHM	Invites to be sent from SC on behalf of HB	5th November	2 x regional calls (3 regions in each) with all members of Finance & Business, People Planner and admin	HB, KE, BA, AM & AHM	Invites to be sent from SC on behalf of HB
								5th November	Advertise Head of Commercial Operations internally & externally	DP	
w/c 4th November	Create Finance & Business structure group (incl. admin). To include KE, HB, AM reps and Finance Managers	HB, KE	SC to provide admin support	w/c 4th November	Create People Planner structure group & set up meeting for following week. To include Hannah, Natalie, Paul, Julie, Steve, AM reps and Finance manager reps	HB, NR, AM reps	SC to provide admin support				
w/c 11th November	Arrange Finance & Business structure group (incl. admin) meeting & prep attendees for w/c 18th November	HB, KE	SC to provide admin support	w/c 11th November	People Planner structure group meets to discuss requirements for as-is and transition to new requirements (meeting 1)	HB, NR, AM reps	Face to face meeting: SC to provide admin support				
w/c 18th November	Finance & Business structure group (incl. admin) meets to discuss requirements for future team (meeting 1)	HB, KE	Face to face meeting: SC to provide admin support	w/c 11th November	Outputs from People Planner session shared with teams & draft structures sent out	HB, NR, AM reps	SC to provide admin support				
w/c 18th November	Outputs from Finance & Business session shared with teams & draft structures sent out	HB, KE	SC to provide admin support	w/c 18th November	People Planner structure group meets for further discussion & to finalise requirements (meeting 2)	HB, NR, AM reps	Face to face meeting: SC to provide admin support	w/c 18th November	Shortlisting & interviewing for Head of Commercial Operations internally & externally	KE, HB	
				w/c 18th November	Outputs from People Planner session shared with teams & final structure (incl. JD's) sent out	HB, NR, AM reps	SC to provide admin support				
w/c 2nd December	Finance & Business structure group (incl. admin) meets to discuss requirements for future team (meeting 2)	HB, KE	Face to face meeting: SC to provide admin support	w/c 25th November	Commence recruitment for People Planner roles	HB, NR, AM & AHM		w/c 25th November	Second round interviews for Head of Commercial Operations (if needed) & offer role	TBC	
w/c 2nd December	Outputs from Finance & Business session shared with teams & draft structures created	HB, KE	SC to provide admin support	w/c 9th December	People Planner interviews	HB, NR, AM & AHM					
w/c 9th & 16th December	Consultation plan to be created for Jan 20 based on finalised proposal	HB, KE, BA, DP		w/c 16th December	People Planner recruitment outcomes confirmed	HB, AM, AHM					

Leanne Aitken

Subject: Focus Group - Joiner Request

From: Julie Thomas

Sent: 14 November 2019 15:21

To: Leanne Aitken <Leanne.Aitken@nas.org.uk>

Subject: FOCUS GROUPS

Hi Leanne

Following on from the conference call with Hannah Barnett, I would like to be included in any focus groups that are established on the way forward with the changing that will be coming in due to the digital transformation.

Thanks for being on hand to answer our questions last week after. It was a lot to take in and having worked here for 20 years I am anxious about the uncertainty that lies ahead but following our chat, I feel like I can make a valid contribution to the focus groups, especially because of the work I have done in the last year on moving our rotas to People Planner and understanding what the problems have been as I have had a lot of interaction with the services and staff as they got used to the tablets and automated time logging. It was also good to know that we have the option of employee assist to support us.

Thanks Julie

Julie Thomas

Area Rota Co-ordinator – NAS Cymru

t: 02920 629309

m: 07483012455

e. Julie.Thomas2@nas.org.uk



Leanne Aitken

Subject: Focus group

From: Hannah Barnett

Sent: 21 November 2019 13:11

To: Leanne Aitken <Leanne.Aitken@nas.org.uk>; Sarah Chivers <Sarah.Chivers@nas.org.uk>

Subject: RE: Focus group

Hi Leanne, what role does John hold, we had a meeting yesterday with finance managers and I will be feeding back in the next couple of weeks, I need to keep things manageable and engaging, will have a think thank you

From: Leanne Aitken

Sent: 21 November 2019 12:46

To: Hannah Barnett <Hannah.Barnett@nas.org.uk>

Cc: Dinah Abaye <Dinah.Abaye@nas.org.uk>

Subject: FW: Focus group

Hi

Could John be added to the call too please?

Thanks

Leanne

Leanne Aitken

Area HR Manager (Wales) / Rheolwr AD Ardal (Cymru)

02920 629 302

07397 727 050

leanne.aitken@nas.org.uk



**National
Autistic
Society**

Transforming lives and
changing attitudes

From: John Evans

Sent: 19 November 2019 09:16

To: Leanne Aitken <Leanne.Aitken@nas.org.uk>

Subject: Focus group

Hi Leanne,

After speaking with yourself and Nick I believe there is an opportunity to be on the focus group for prospective changes.... Can I be added to that group please?

I know that I haven't had much involvement in People Planner but I do process the manual timesheets for payroll and have some experience with Focalpoint and how the invoicing

process has changed since its launch. I feel better now that I have more of an understanding of what NAS is trying to do by revising the way the finance roles are set up and I will start working on the task you set us to capture what we do on a daily, weekly, monthly basis and what bits of my role I could allocate elsewhere.

Ta,
John

John Evans

john.evans@nas.org.uk

Area Finance Administrator / Health and Safety Coordinator (Wales)

Gweinyddwr Cyllid Ardal / Cydlynnydd Iechyd a Diogelwch (Cymru)

02920 629 305

National Autistic Society Cymru
2nd Floor / 2il Lawr
Lancaster House / Tŷ Lancaster
106 Maes-y-Coed Road /
106 Ffordd Maes-y-Coed
Heath / Y Waun
Cardiff / Caerdydd
CF14 4HE



Julie Thomas
UWTSD

Tel / Ffôn: 029 2062 9300
Email / Ebost: wales@nas.org.uk

1 December 2019

Dear Julie

Leanne Aitken's Role – Implementation/Communication of Changes to Business Structure

Leanne (in consultation with the HR leads across the remaining UK areas) was instrumental in formulating the communications plan whilst facilitating the Wales agenda and ensuring that the project plan was realistic in terms of timeframes from a Wales standpoint. She represented Wales at the sessions with me in the run up to the meeting with impacted staff, which she attended with them and clarified any questions they had.

Because Leanne is a trusted business advisor and is respected amongst by the workforce, one of her key strengths is her ability to disseminate messages in a non-threatening and inclusive manner whilst retaining a relatable demeanour that enables people to open up to her regarding their concerns. She is happy to make herself available to people and in my view, has been successful in managing a difficult and precarious change situation with wide reaching ramifications if we are to get this wrong, in a consistently professional and empathetic manner.

Kind regards



Nick Haake
Area Manager - Wales

New roles



- What does the 'efficiency' mean in the job role 'business development and efficiency' manager? If the intention is to have a dedicated 'business and development' team Will there be a clear organisational strategy defining exactly how and what Adult Services will be providing in the future and where they intend to grow. Will new roles be formed as part of this team? Will Area Managers have ultimate responsibility for growth and development in their business area? If so you will you set KPI targets?
- People Planner Super Users – what are assumptions based on? Some areas are bigger than others, some have more supported living and one person services and outreach. Who will line manager them, local or national? Area Managers will have accountability for area therefore what role will they have? Will people planner super user role link with HR and Finance/payroll and invoicing. What role will RMs play in this?
- One person to manage sales and contracts - does this mean they are part of the business development team and will only deal with new contracts? Where will existing contracts fit within this structure?
- Pricing analysis - are these two posts for all package pricing new and old?
- Will local admin roles be required to carry out finance audits of individuals money or will these be carried out centrally?

EU 23 1/2

New roles



- The 3 super users should be skilled in working across systems and would have responsibility for being the primary point of contact for their allocated services and escalate any complex queries to the SME where required (whilst working collaboratively on larger projects)
- How will all the moving parts link up through the course of a tender, for example? (e.g.: co-ordinating the variables involved in a tender submission and driving the process against the allotted timeframe) and how would work be prioritised in the event of multiple RFP's with conflicting timelines? Would there be merit in incorporating "primary regional liaison" responsibilities into one of the admin roles and that staff member would be the contact point in respect of referrals, tender applications, assessments?



National Autistic Society Staff Survey 2019 - Whole Organisation Report

Agenda Consulting



Highest and Lowest Relative to 2016

Key



Difference of +5 or more
Difference of -5 or more

Highest Relative to 2016

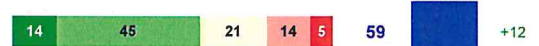
53. I am kept informed of what is happening elsewhere in the National Autistic Society



70. I receive a good service from the Internal Communications team



75. I understand the role of the Staff Forum within our charity and know how to get in touch with my representative



58. I receive a good service from the HR team



57. I receive a good service from the IT team



Lowest Relative to 2016

26. We regularly involve volunteers in our service/school/department



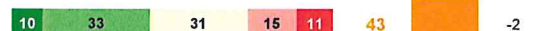
20. My pay is competitive compared with similar organisations



25. The people in my team work together to get the job done



71. I believe that the Senior Management Group will act on the results of this survey



49. My colleagues show concern for the wellbeing of the people we support in a caring and meaningful way



Key

Key

Key factor for employee engagement


 Difference of +5 or more
 Difference of -5 or more

Difference to

Leadership at the National Autistic Society

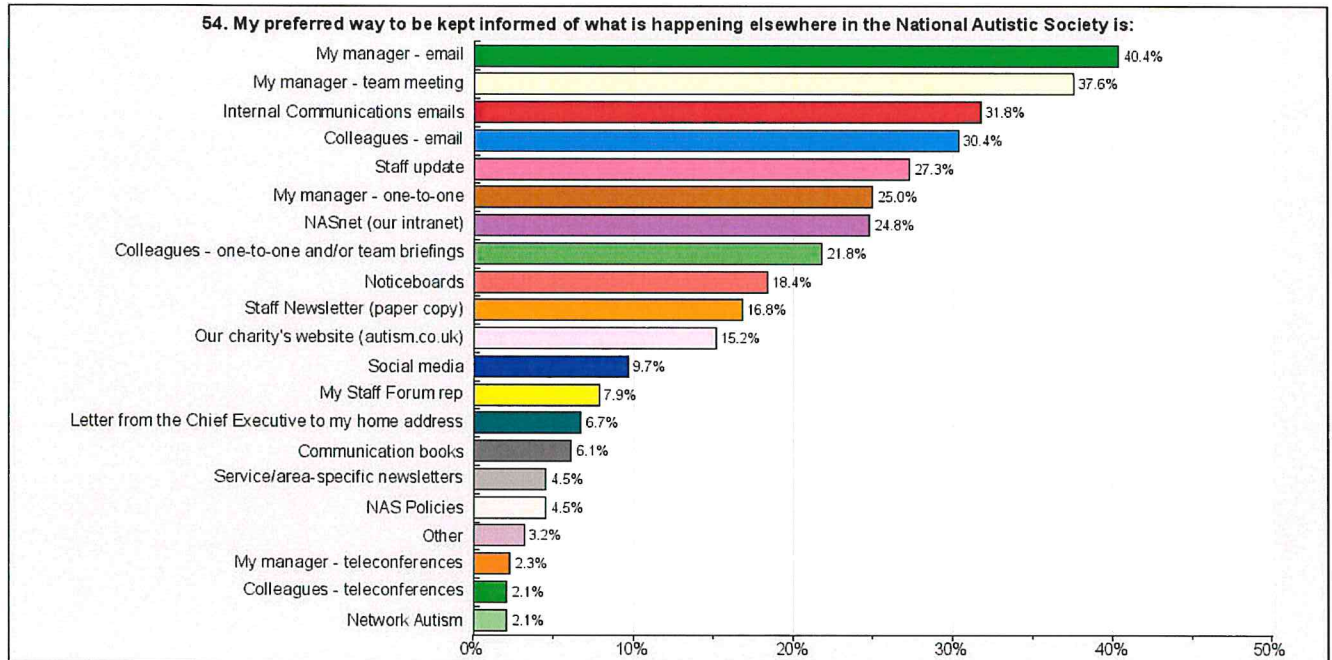
						2019 Overall Positive %	Traffic Light	2017 Overall Positive %	2016 Overall Positive %
Leadership at the National Autistic Society		17	39	28	10	6	56	-2	+4
78. I understand our charity's core beliefs and values		35	54	8	2	1	89	-	+1
Key 79. I trust and respect the managers of my service/department/school		32	44	14	5	5	76	-	+5
80. I believe our charity is a good employer of autistic people		20	45	25	6	4	64	-	-
77. I believe that the school/service/department I work for benefits from being a part of a large, national charity		16	45	27	8	4	60	-	+2
75. I understand the role of the Staff Forum within our charity and know how to get in touch with my representative		14	45	21	14	5	59	+1	+12
73. I trust and respect my Director		17	33	40	5	4	51	-	-
Key 72. I trust and respect the Senior Management Group		12	36	37	8	6	49	-6	+1
Key 71. I believe that the Senior Management Group will act on the results of this survey		10	33	31	15	11	43	-	-2
76. Our charity manages change effectively (for example, reorganisation of departments and teams, changes to national systems, processes and policies)		7	30	37	17	9	37	-	+7
Key 74. The Senior Management Group are in touch with the views and opinions of staff		8	28	37	17	10	36	-	+1

Respondents were given the following guidance:

Our Senior Management Group, made up of eight directors, manages what our charity does day to day.

54. My preferred way to be kept informed of what is happening elsewhere in the National Autistic Society is:

Respondents were invited to pick up to 5 responses.



Key



Difference of +5 or more
Difference of -5 or more

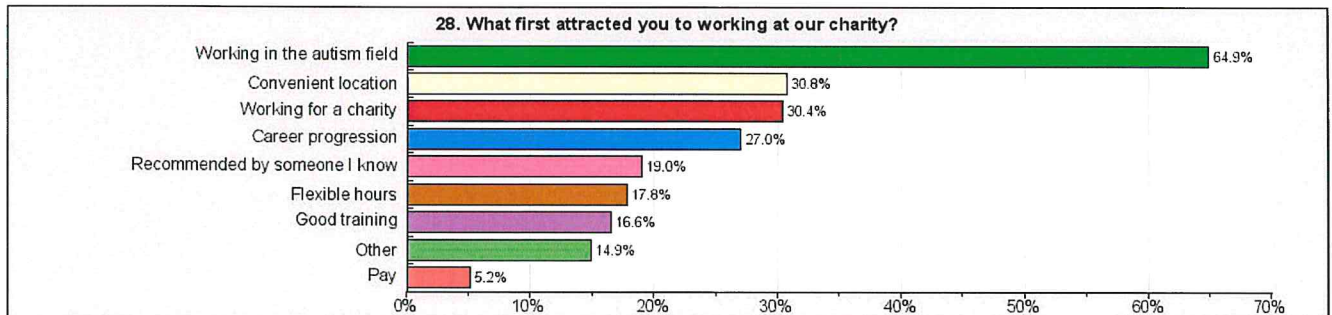
How I feel about the National Autistic Society

						2019 Overall Positive %	Traffic Light	2017 Overall Positive %	2016 Overall Positive %
How I feel about the National Autistic Society	20	37	24	11	8	57		-1	+4
29. I intend to still be working for our charity in 12 months' time	28	34	24	7	7	62		+2	+4
33. I have heard of the Digital Transformation Programme	26	36	10	17	12	61		-	-
27. I would wholeheartedly recommend our charity as a good place to work	12	41	27	12	7	54		-4	+5
34. I feel the Digital Transformation Programme is a positive change for our charity	15	37	36	7	4	53		-	-

Please note, question 34 was only asked of respondents who answered "Strongly agree" OR "Agree" OR "Neither agree nor disagree" to question 33 "I have heard of the Digital Transformation Programme".

28. What first attracted you to working at our charity?

Respondents were invited to pick up to 3 responses.





Action plan: Area

[illegible]

Meet our Digital Transformation Champions

01/02/2019

How to stay updated

Share your stories

Blogs

Yammer

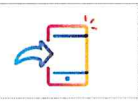
Publications

The Spectrum

Your Autism Magazine



Digital Transformation Programme



The [Digital Transformation](#) is well underway. To help make the transition to our new digital tools and systems a little easier, meet c
Transformation Champions!

Next time you have any questions about the Digital Transformation, would like to share feedback about the project or need some help and don't know ask, get in touch with your nearest Champion listed below.

Name	Area	Name	Area
Andrea Connelly	Central	TBC	South West
Debbie Bonnett	Central	TBC	South West
Emma Pengelly	Central	TBC	South West
Graham Teale	Central	TBC	South West
Helen Pedder	Central	TBC	South West
Janice Osborne	Central	TBC	South West
Katie Smith	Central	TBC	South West
Lynda Osbourne	Central	TBC	South West
Vikki Hayes	Central	TBC	South West
Gareth Jones	London SE	TBC	South West
Gemma Fry	London SE	TBC	South West
Gul Collis	London SE	TBC	South West
Hazel Datten	London SE	Caroline Pritchard	Wales
Ivan Kyeyune	London SE	Chris Price	Wales
Katrina Harrigan-Serrette	London SE	Darren Solloway	Wales
Maria Cronin	London SE	Emily Isaac	Wales
Nicholas Grefsheim	London SE	Emma Hammond	Wales
Rob Bunting	London SE	Emma Pearce-Gordon	Wales
Sam Maouhoub	London SE	Gemma Price	Wales
Sara Younus	London SE	Harry Coster	Wales
Susan Baker	London SE	Ian Giles	Wales
Amy Strutz	North	Jane Price	Wales
Azra Balu	North	Jean-Luc Jamois	Wales
Carl McGarry	North	Joedanna Davies	Wales
Elizabeth Windle	North	Julie Thomas	Wales
James Plummer	North	Libby Davies	Wales
John Ratcliff	North	Lisa Plant	Wales
Kayleigh Swindlehurst	North	Maurice Chambers	Wales
Kudus Ali	North	Megan Roberts	Wales
Leslie Daly	North	Mike Diamond	Wales
Mark Cooke	North	Natasha Williams	Wales
Rachel Mullins	North	Nicola Lloyd	Wales
Sarah Klean-Jepson	North	Paul Grimshaw	Wales
Timothy Glenn	Northern Ireland	Samantha Border	Wales
Euan Grant	Scotland	Sarah Johns	Wales
Gordon Rush	Scotland	Scott Lewis	Wales
Mark Hodge	Scotland	Stephen Crago	Wales
Rachel Taylor	Scotland	Aurelie Dugas	Sybil Elgar School
Scott Harris	Scotland	Jasmit Matharu	Sybil Elgar School
Tara Thomson	Scotland	Jon Brough	Sybil Elgar School
TBC	South West	John Green	Robert Ogden School
TBC	South West	Teresa Steel	Robert Ogden School

For more information about the [Digital Transformation](#) visit the [homepage](#) on NASnet.

Leanne Aitken

Subject: FW: Staff Survey 2019 results

From: CEO

Sent: 13 December 2019 09:46

To: All Staff at NAS <AllStaffatNAS@nas.org.uk>

Subject: Staff Survey 2019 results

Hello everyone,

I am emailing you to share the results of our 2019 Staff Survey.

I'm so pleased that nearly half our charity took the time to let me, and my colleagues on the Senior Management Group (SMG), what we're doing well and what we need to improve.

Here are the areas I think we should be celebrating and the areas I think we need to work on.

Areas to celebrate

- **Whistleblowing:** I know how to report poor practice **92% positive**.
- **Line managers:** questions across this topic average **82% positive**.
- **Learning and development:** questions across this topic average **65% positive** and have **gone up 6%** since 2016.
- **Support departments:** positive responses to all departments, like IT and HR, have **gone up 7% overall** since 2016 – this was an area of focus for our previous staff survey action plan.
- **Communication at our charity:** has **gone up 10%** since 2016 – this was an area of focus for our staff survey action plan.

Areas to improve

- **Pay and benefits:** I am rewarded fairly for the contribution I make to my role **25% positive**.
- **Leadership:** I trust and respect the Senior Management Group is **49% positive** and has **gone down 6%** since 2017.
- **How staff feel about our charity:** 54% of staff are engaged ie would wholeheartedly recommend our charity as a good place to work and this has gone up 39% since 2015, but is still **only 54%**.
- **Performance management:** I receive regular, timely feedback that helps me improve my performance and feel valued has gone up 7% since 2016 but is still **not as good as it should be**.

Your Principal, Area Manager or Head of Department has a copy of the full report, which they can share with you, if you would like to see it.

What's next?

- **Your area/school/department's results** – your Area Manager/Principal/Head of Department will share your department or school or area's staff survey results with you by the end of next month. They will then work with you on an action plan for your area which will be submitted to SMG.
- **Charity-wide action plan** – we have already shared these results with National Staff Forum, who have helped us start work on a charity-wide action plan which we'll share with you in March 2020. We also want you to be able to feedback on the plan, so please email me directly if there's something you'd like to add.

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- **Pulse survey** – we will be having a pulse survey in early 2020 to see if we're going in the right direction.

Get in touch

If you want to add your input to the on the staff survey action plan, you can get in touch with me directly by emailing CEO@nas.org.uk or talk to your National Staff Forum Rep You can find out who your National Staff Forum rep is by emailing Internal.Communications@nas.org.uk

I just want to reassure you, I am taking these results really seriously, and am looking forward to working with you on this.

Caroline
Chief Executive