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Qualification: CIPD Diploma in Applied Human Resources

Module Name: Contributing to the Management of Change

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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:

A handwritten signature in black ink, appearing to be 'J. Thomas', written over a horizontal line.

J. Thomas

Date: 5th February 2020

Contributing to the Management of Change

1.1 Establish the need, objectives and potential benefits in relation to a specific change requirement

The need for change was established by an internal driver whereby, the leave management technology was no longer fit for purpose after adopting new terms and conditions to drive agility across the organisation. CIPD (2019) note that technological developments are often a driver of change. Ateb is undergoing change in many areas of the business due to internal and external drivers. The existing leave management system was dated, required timely manual manipulation to make simple changes, was heavily driven by HR administration, it was not easily accessible, it was costly to add user licenses and make changes set structures.

The change objective was to identify and implement a system which reflected Ateb's newly adopted terms and agile working, is flexible to adapt to Ateb's continually changing environment, is value for money and gives managers and teams the ability to self-manage their leave. The potential benefits of implementing such a system is having the agility to easily make amendments to the system to reflect changes thus, supporting Ateb's changing environment. The new system could see savings financially and in time as the existing system was very time consuming for both HR administering the system and systems users.

Including myself, the People team led this change process which included identifying systems; selecting users to trial systems; analysing feedback; selecting, implementing and populating the chosen system; providing training; and continually supporting staff using the new system.

1.2 Analyse who will be affected by the changes and their potential information and support needs

Once the need for change was established, I developed a stakeholder analysis (EV.1) in order to identify who would be affected by the change and what information and support they would require. SHRM (2015) notes mapping stakeholders will set the foundations for a communication plan by helping to identify individuals who need to be involved and who are affected.

I identified the level of influence and interest each stakeholder has to understand their importance to the change. I noted why the stakeholder was necessary to the change to act as a reminder and also to inform colleagues and other departments should they need to see the stakeholder analysis. Lastly, I noted what information and support they would require. The stakeholder analysis informed my change plan by ensuring relevant stakeholder involvement was included.

Only internal stakeholders were affected as the new system would only be used by team members with no effect on external stakeholders. The internal stakeholders included the entire organisation however, I broke this down into management, team

individuals and team individuals with poor ICT competencies; management would require further information of how to manage their team leave, and team individuals with poor ICT competencies will require more support and simplified information.

1.3 Identify the resources required for the change process and how these will be made available

The resources required were identified and noted in the change plan (EV.2).

I considered the ICT Infrastructure to ensure we have the correct requirements to host the chosen system. At the point of creating the change plan, it was unknown what system we would be adopting however, we have chosen a cloud hosted web-based system which did not rely on our current infrastructure. Had we chosen a system similar to our previous system, we would have required intense support from ICT to embed it within the infrastructure.

I considered hardware such as laptops, software including Microsoft Suite to develop user guides and complete data exports for population using Excel, access to printing facilities for the user guides and access to Yammer (work-based communication platform) to feed general communication. I used a range of software including Word, Excel and Adobe Acrobat (EV.4).

The training room and presenting equipment was included to accommodate the drop-in sessions; I booked the training room ahead of the sessions (EV.5).

I included 'people power' as a key resource in the change process; the process was led by the People Team which are a small team of 3 therefore, we were a key but very limited resource. Johnson (2017) highlights that resources mean more than just money, it means allocating the correct people to the change process. As a limited resource, other People tasks not associated with the change may have been delayed; if I anticipated any delays, I would communicate with line managers so they were aware (EV.6).

1.4 Devise a plan, including objectives, actions and timescales for implementing the required change.

CIPD (2019) note that leaders of change must design change to identify obstacles to tackle to enable the change. I completed a change plan (EV.2) which provides a detailed account about the change progress from the beginning of the process to the end of the process. The change plan was referred to continually during the process to ensure objectives were being met; furthermore, the change plan was updated, and a new version number noted if changes were made. When the change plan was completed, I set up a meeting with my team to review the plan and agree it before starting the change process (EV.3).

The plan included the following items in the change plan:

Vision – Details what is changing, why the change is happening and what we envisage for the future.

Lead – Who is leading the change process.

Stakeholders – This links to the stakeholder analysis created separately.

Roles & Responsibilities – Defining the roles and responsibilities for individuals or team contributions. This will inform those involved what is expected from their roles and alternatively, for those not leading the change, it will inform them who is leading the change and what they can expect.

Objectives – Detailing the objectives that must be completed to successfully implement the change. The objectives in the change plan are assigned to a person or team contributing to the change with a date to achieve it by. A section with a review date is included to ensure progress is continually reviewed and delays are identified quickly to reschedule further objectives.

Timescales – A Gantt Chart is linked here (EV.7) detailing the time scheduled for each objective. Gantt charts are beneficial because it is a visual timeline to illustrate project process, helping change contributors to assess the duration of the project and singular objectives (Kashyap, 2019).

Communication Plan – The communications plan is linked here (EV.8).

Resources – The key resources which are critical to the plan are detailed, explaining why the recourse is necessary.

Constraints – Constraints and limitations are detailed; by attempting to foresee obstacles, actions can be put into place to avoid these and increase the chances of success.

Available Support – The available support for stakeholders is detailed. Considering how to support stakeholders before implementing the change can support the team to overcome resistance easily during implementation.

Milestones – The change milestones are listed here for the team to focus on; once a milestone is reached the team should celebrate their success to remain motivated.

Monitoring Activities – The change plan should be monitored to ensure the process is on track or to identify delays, obstacles or resistance. The monitoring activities are listed here which will be used during the change process.

1.5 Communicate the change plan, and gain agreement for its implementation, from decision makers.

Once I completed the change plan, I had a meeting with my manager (EV.3) to discuss the plan and identify if amendments are required. During our meeting, I provided a copy of the change plan and discussed each section. I was concerned the objectives were broken down into too much detail however, my manager was happy with the level of detail as each objective was crucial to the implementation of the system; had some objectives been merged into one, it would run the risk of a key step being missed. We had many discussions about how the new system would be implemented prior and during the time I was creating the change plan therefore, no amendments were necessary, and my manager was happy to agree implementation (EV.10).

2.1 Follow the agreed plan to implement change processes.

The objectives section included columns for the target date/completion plus the review date and confirmation of completion. The target dates were diarised for the team and I to check the progress and note if the objective was completed; if the objective was not completed, a review date was scheduled which was then diarised and again checked. I would communicate changes to the relevant people when changes were made to the change plan such as a review date (EV.11/ EV.12). I would touch base with the people responsible for objectives to see if progress was being made or if delays were expected; this ensured any issues were identified early on and minimise further knock-on delays (EV.12).

The team and I focused on the milestones to maintain enthusiasm and motivation; moreover, milestones signify development and movement through the change plan whilst acting as a signpost to keep teams on track (Harned, 2018).

Once the system was purchased, I communicated to all my teams at team briefings about the forthcoming change; I used this opportunity to explain why the change was needed, our change vision and benefits of the new system (EV.13). During the latter stages of the change plan objectives when employees were aware of the changes, I would provide updates to teams about our progress and next steps to ensure the change was consistently promoted (EV.14).

I referred to 'Kotter's eight step' model as a framework to the change process. The model helped guide the process when implementing the change to ensure no critical elements were missed thus increasing the chances of success (MindTools, ND). I created a sense of urgency and developed a vision during the team briefings by explaining the change, vision and benefits. I communicated, removed obstacles and created goals using the change plan by continually promoting the change, anticipating problems and creating milestones to track and celebrate. The last steps to build on the change will be done at a later date once the change has matured and I can evaluate the change.

2.2 Provide information and support to stakeholders in line with their identified requirements.

I created a series of user guides which provided a simple step-by-step tutorial of how to complete relevant activities, such as how to book annual leave (EV.16). These were distributed to all employees.

We delivered a series of drop-in sessions which were informal and driven by employee individual queries and needs therefore, tailoring the session. By taking a tailored approach, it encouraged employees to be open in their concerns or questions and gave them sufficient time to understand, as opposed to agreeing with the masses during structured sessions. The feedback received was very good and those who attended felt confident to approach and use the system (EV.17/ EV.18).

We recognised that not all employees are ICT competent and may struggle adopting new systems. To provide support, we communicated clearly during the team briefings and drop-in session communication, that ad-hoc one-to-one support was available should anyone need it. Furthermore, I approached my teams line managers to remind them that I am available for further support (EV.17/ EV19).

2.3 Apply techniques for maintaining positive working relationships throughout the change processes.

During the early stage of trialling a new system, to the latter stages when a new system was chosen, I was open and transparent as to why we were considering or adopting a different system; this was because of the new terms and culture change which was on the horizon therefore, we wanted to be prepared to change in line with this. I promoted this as a beneficial change and always voiced the vision, so employees understood why.

Alongside e-mail communication, I used other channels of communication such as face-to-face, Yammer, telephone and Skype; by doing this, I hoped it would suit most preferences of communication and maintain our working relationship. I communicated transparently and regularly to build trust and reduce any resistance.

I provided support to employees during the drop-in sessions, resolving any query that was raised and tailoring my approach to the audience as everyone has different needs for example, somebody who said they were not ICT competent, I took my time detailing every step and using less jargon; I would also offer to help them with the digital aspect wherever I could. I signposted all employees to the user guides, whilst I offered support, it was also important to help employees feel empowered to embrace the new system and for some, to overcome their fear of attempting to use it.

When I encountered any resistance, I would approach the situation calmly by actively listening and communicating clearly and transparently, trying to resolve any issues they have. I encountered very little resistance however, on one occasion an

employee was irritated and difficult however, my approach diffused the situation and avoided any deterioration to our working relationship.

Scott Nash – Senior Technical Officer, who line manages a team I supported closely during the change process, has provided a testimonial of how I maintained positive working relationships (EV.20).

2.4 Monitor the effectiveness of the implementation, agreeing and making justified adaptations where required.

During population of the new system, I continually assessed the process and performance of the system to ascertain if it was operating as expected. I did system tests with the help of my colleagues whereby, I would ask them to complete a task, such as booking annual leave, to see if the process was as expected and how it came through to the HR and line management side of the system. If I identified anomalies, I would work back through the task to try pinpoint the issue.

For example, I identified an issue where the system would only accept standard working hours in 15-minute intervals i.e. 7 hours, 7 hours 15 minutes etc, therefore, our standard working day of 7 hours and 24 minutes would not be accepted. Our standard working week is 37 hours therefore, I thought the best approach was to input the standard working day as 7.5 hours Monday to Thursday and 7 hours on a Friday. Whilst it was not ideal, this was the most straightforward approach to use in the interim; the provider advised changes were being made to the system where any hours could be inputted. Similarly, I was unable to correctly input standard working hours for a part-time employee who worked 8 hours 20 minutes. Therefore, I thought the employee could book annual leave as 8 hours 30 minutes and each quarter, I will monitor the booked annual leave and credit the employee with any owed annual leave. I proposed my ideas to my manager explaining what I had done to attempt to overcome the issue and why I thought these were the best outcomes. My manager agreed with my proposals and thought they were justified due to the issues we were experiencing. I then continued implementing the system with the agreed changes.

I have attached e-mail communication where I explained to staff how to book annual leave using the agreed new working pattern (for the purpose of the system, as opposed to contractual change (EV.21)). The witness testimonial from my manager, Victoria Evans, supports this explaining I monitored and agreed necessary changes (EV.10).

2.5 Maintain records of the change process in line with organisational requirements.

SurveyMonkey was used to gain feedback from the users who trialled the system (EV.22). The surveys are sent using the department SurveyMonkey account as expected. Once the surveys are closed, the survey remains on the Survey Monkey account for the agreed retention period, to enable us to refer to the results for analysis.

As the People Team would no longer be using the old system for leave management and the system was being removed, we extracted annual leave information to ensure we held accurate leave information, as required. The information was extracted into reports and stored in the appropriate electronic filing location which is organisational requirement (EV.23).

In order to populate the system, I had to extract employee information from the HR database and insert relevant information into a specific template. To ensure security and confidentiality, the data template was stored in the protected appropriate electronic location, plus the document was password protected; this satisfied the organisational and wider GDPR requirements (EV.24).

3.1 Measure the effectiveness of the change process in meeting the required objectives.

As the change is relatively new, with the system being implemented in December 2019 – January 2020, the effectiveness of the change process has been measured by establishing the effect it has had on stakeholders. Me and my colleagues would speak to teams directly face-to-face or by phone during the implementation stage and ask them if they understood what to do, how easy or difficult they found the system and if the information communicated was sufficient. Most employees found the system easy to use and had little difficulty transitioning to a new system however, it was a common theme that employees and line managers found calculating/booking/approving leave in hours confusing. We reassured employees to always ask if they need help and we tried to explain hours in annual leave again to help them understand. Tom Waters – Digital Support Coordinator has provided a witness testimony to support my statement as I monitored the effectiveness of the change within his team (EV.13).

Due to the level of people confused about annual leave hours, the People Team have planned to assess annual leave hours in 6-12 months; we plan to do this to assess whether employees have grasped using leave in this way or if it is causing unnecessary issues. If we find it is problematic, we may return to annual leave in days. We would assess this using a survey.

The new system is significantly cheaper than the old system; the old system was very expensive as there was a monthly fee for the main system license and system support plus a fee for individual licenses. The new system has a small monthly fee, support calls are free and there is no increase in cost until we exceed 250 employees, which is beyond our current growth. Whilst it is too early to fully evaluate the benefits and improvements compared to the old system, it is positive that we have implemented a similar system for a fraction of the cost.

A further drop-in session has been arranged after a full month of usage, so employees have had time to experience the new system, to provide them with an opportunity for further support or to ask questions (EV.15).

3.2 Identify further work required to embed changes and/or further developments required.

Further to the issue described in LO2.4 regarding the system only accepting standard working hours in 15 minutes intervals, the People Team anticipate a programme of change when the system provider updates the system to allow any working hours. This will help develop the system and result in the change process aligning not only to the new terms and culture but also our existing structures.

The new system has many other functions including training and a document portal. The training function allows learning and development activities to be recorded either by the People Team, line manager or the individual; a live training history is available for all employees as well as producing reports. The document portal allows the People Team to upload mandatory documents to selected employees, the employees are notified of the document and once they have read the document, there is a function to confirm they've read it for compliance reasons. Imminently, I will be testing both functions; the training function will be tested against our existing system whereas, the document portal will be used and assessed if it was more effective than our current manual approach (EV.10). Should either or both tests are positive, I will begin implementing these functions for all employees in a similar fashion to this change process.

3.3 Communicate the key outcomes and the impact of change to stakeholders.

Gleeson (2017) encourages gathering feedback continuously throughout the change process in both top down and bottom up channels, noting effective communication is key to high-performance and making the change believable and authentic. My manager had to provide the Executive Management Team with a brief overview following implementation of the system therefore, I e-mailed my manager key outcomes and how it impacted those affected (EV.25). My e-mail provided key details about system user levels and feedback from the teams which both demonstrated the impact to stakeholders. I e-mailed all employees detailing the outcomes of the new system and highlighting the ongoing provision of support. I posted this as we approached the end of month 1 so I could include an overview of what's happened so far, reminders and what is happening next (EV.26).

3.4 Evaluate the effectiveness of own performance in contributing to the management of change.

Upon reflection, I feel my performance was effective when implementing the change process. The change plan helped me achieve the outcome effectively as it was detailed and broke the change process down into manageable clear objectives. I met my own objectives within the timeframes specified and communicated regularly to drive the change.

Reflection upon the CIPD's Profession Map, I feel I demonstrated the 'skilled influencer' behaviour as I was able to gain the required commitment through effective and influencing communication. Furthermore, I anticipated reactions and

tried to overcome resistance before it escalated and continued to build relationships and communication with line managers. I also believe I demonstrated the 'driven to deliver' behaviour as I set clear objectives, monitored progress and focused on priorities; when objectives were slipping, I retracked the progress and resolved issues. Importantly, I maintained enthusiasm and commitment for the change progress and continued delivering results (CIPD, ND).

I noted that the 'decisive thinker' behaviour could be improved; with better ability to analyse and understand data, I may have had a more insightful view of the change process as it progressed. As the system was implemented recently, based on my knowledge, I believe the most effective method of gathering feedback was through face-to-face conversations. However, with increased knowledge in this area, I may have chosen a more effective method or a method to gain more information than I received. I collate various data now and complete some basic analysis however, to improve in this area, I will suggest to my manager that I shadow her during the data analysis process as I may come to understand data better or the methods used; it will also be an opportunity to ask questions to widen my breadth of knowledge. Furthermore, I feel I could improve in the 'organisational development' professional area. When reviewing the competencies in this area, I am working at a low level however, due to the continuous change Ateb is experiencing across all departments, it would be beneficial to be more knowledgeable and competent in this area (CIPD, ND). I have outlined the identified improvements in a CPD Map (EV.27).

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CIPD Candidate evidence matrix (EXAMPLE)

(CEM1)

Candidate name: Joanne Thomas				CIPD Membership/registration No.: 53274130		
Qualification title: CIPD Diploma in Applied Human Resources				Unique Learner No. (ULN): 1403229		
Unit code	Unit title	Assessment criteria no.	Evidence description	Evidence reference number	Assessor initials	I/V initials if sampled
		LO1	Stakeholder Analysis.	EV.1		
		LO1	Change plan.	EV.2		
		LO1	Outlook calendar appointment inviting team members to review/agree change plan.	EV.3		
		LO1	Screenshot of files to demonstrate use of software which was identified as 'resources' in the change plan.	EV.4		
		LO1	Auto-acknowledgement e-mail that the training room was booked for drop-in sessions.	EV.5		
		LO1	E-mail to Tom Waters – Digital Support Coordinator (line manager), to inform of delays within the People Team due to the change process.	EV.6		
		LO1	Gantt chart.	EV.7		
		LO1	Communications plan.	EV.8		
		LO1	Outlook calendar appointment to evidence meeting to discuss change plan.	EV.9		
		LO1/ LO2/ LO3	Witness testimony from Victoria Evans – People and Communications Manager.	EV.10		
		LO2	Diary entries recording reminders to check progress of change plan objectives.	EV.11		
		LO2	Communication to confirm changes to the change plan.	EV.12		
		LO2/ LO3	Witness testimony from Tom Waters to confirm team briefing about forthcoming change and monitoring effectiveness of change in his team after implementation.	EV.13		

		LO2	Communication continually promoting the change.	EV.14		
		LO2	Evidence of drop-in session after implementation to further support stakeholders.	EV.15		
		LO2	User Guide created for stakeholders (document titles plus 1 guide).	EV.16		
		LO2	Evidence of drop in sessions to support stakeholders with their identified requirements.	EV.17		
		LO2	Email from Debbie Yates providing feedback about the drop-in session.	EV.18		
		LO2	Emails to/from line managers regarding additional team/one-to-one support for stakeholders.	EV.19		
		LO2	Witness testimony from Scott Nash to describe how I maintained positive working relationships with his team.	EV.20		
		LO2	E-mail demonstrating communication to staff regarding change to working hours (for purpose of system).	EV.21		
		LO2	Survey Monkey analysis.	EV.22		
		LO2	Screenshot of storage location for leave data reports.	EV.23		
		LO2	Screenshot of storage location and password protection for confidential document.	EV.24		
		LO3	E-mail to Victoria Evans detailing the key outcome and impact to stakeholders.	EV.25		
		LO3	Yammer post informing stakeholders about the outcome of the change process.	EV.26		
		LO3	CPD Map.	EV.27		

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:	05.02.2020
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Notes on candidate evidence matrices

Candidates should be encouraged to develop a matrix indicating how their evidence relates to each unit/module and learning outcomes/assessment criteria. This helps advisors and assessors to support candidates to draw links between units and encourage cross-referencing and the possible multi-use of evidence.

Evidence matrices can be developed using the unit/module and learning outcomes/assessment criteria, giving candidates an opportunity to link their evidence to each outcome.

Another approach is to have a more generic form where candidates list evidence and tick relevant boxes to show coverage.

Whatever approach is employed candidates should be encouraged to complete these forms themselves and not expect assessors to do this for them.

Stakeholder Analysis

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

Stakeholder Name	Influence Level	Level of Interest	Stakeholder Grouping	Why Necessary	Information Required	Support Required
ICT	High	Low	Minimal Effort	- Expertise/advice when researching systems - Support to implement system - Technical ICT support during implementation	- Share information when researching system - Share information and business requirements when identified system - Dates for implementation	Provide change plan information and dates for implementation to allow department to provisionally allocate time to support us.
GDPR Officer	Low	High	Keep Informed	To ensure the system is GDPR compliant	Completion of a Data Protection Impact Assessment	None
Individuals testing systems	High	Low	Minimal Effort	Selected individuals will be testing systems to provide feedback after a trial period	- What the system is - What we would like the system to do i.e. sickness confidentiality - What we would like them to test	- How to use the system - Provide questions to provide structured feedback
Managers	High	High	Key Players	Key system user	Which system we have chosen	Regular communication to

				- Will need to learn new method of managing team leave. - Learning to adopt leave in hours.	- What the system does - How to use the system - How to manage team leave using the system	identify issues or concerns Management briefings and training of how to use system
Team individuals	High	High	Key Players	- Key system user - Will need to learn new method of requesting/ managing leave. - Learning to adopt leave in hours.	- Which system we have chosen - What the system does - How to use the system	- Regular communication to identify issues or concerns - Team briefings and training of how to use system
Team individuals – with limited technology competency	High	High	Key Players	As above	As above, plus: - Simplified instructions - Slower roll-out of information to avoid overwhelming individuals	As above, plus: One-to-one support

Change Plan – Leave Management System Implementation

Created by	Joanne Thomas – People Advisor
Created on	06/06/19
Version	V3

Vision

To research and implement a new leave management system to support the recent changes adopted from the Our Future Workplace terms & conditions.

To support our increasingly agile environment to meet customer demand, the chosen system will be flexible to allow for changes whilst being value for money.

To be time efficient, the chosen system will allow a self-service function for managers and teams to manage their own/team leave efficiently therefore, releasing value time in the People team to focus on further projects.

Lead

The People Team will be leading this change process and championing the need for change however, support will be provided from the ICT team to check for suitability and support for implementation.

Stakeholders

The stakeholders have been identified in the Stakeholder Analysis which is available [here](#).

Roles and Responsibilities

Joanne Thomas – People Advisor	Role: To take a leading role in the change process. Responsibilities: To identify a suitable system and implement including populating system. To provide information and support to stakeholders and continually support teams to achieve success.
Kate Houston – People Advisor	Role: To take a leading role in the change process. Responsibilities: To identify a suitable system and implement including populating system. To provide information and support to stakeholders and continually support teams to achieve success.
Victoria Evans – People and Communications Manager	Role: A strategic role ensuring the chosen system is fit for purpose and fulfils the future People strategies.

Change Plan – Leave Management System Implementation

EV.2 (Pg.2)

	Responsibilities: Purchase chosen system. Establish plans are accurate and executed on time. Continually review progress. Support teams in implementation.
ICT Department	Role: To support the People Team in choosing a system suitable for the technology infrastructure we have at Ateb. Responsibilities: Provide advice and support to the People Team as and when required.
GDPR officer	Role: Provide support to the People Team to ensure the chosen system is GDPR compliant Responsibilities: Support the People Team to complete the Data Protection Impact Assessment accurately.

Objectives					
Objective	Responsibility	Target date / Complete?		Review date	On track?
To identify system to trial, trial group and analyse feedback	People Team	10/09/19		16/09/19	
Identify suitable system to pursue	People Team	01/10/19		15/10/19	
Confirm system is suitable for technology infrastructure at Ateb	ICT Team	10/10/19		15/10/19	
Complete Data Protection Impact Assessment	Kate	20/10/19		30/10/19	
Ascertain if the system is GDPR compliant	GDPR Officer/ People Team	25/10/19		30/10/19	
Purchase system	Victoria	01/11/19		03/11/19	
Understand how to operate system	People Team	15/11/19		18/11/19	
Produce user guides to distribute to staff	Jo	24/11/19		24/11/19	
Communicate chosen system to staff via team briefings	Jo / Kate	10/11/19		15/11/19	
Populate system	Jo	20/11/19		21/11/19	
Calculate annual leave	Jo & Kate	22/11/19		23/11/19	
Set up working patterns and leave patterns on system	Jo & Kate	25/11/19		25/11/19	
Identify support drop-in session dates, book	Jo	25/11/19		26/11/19	

Change Plan – Leave Management System Implementation

training room and communicate dates to staff					
Send welcome e-mail and remind staff to register	Jo	30/11/19		02/12/19	
Complete drop-in sessions/ remind staff to attend if support needed	Jo	12/12/19		18/12/19	
Monitor that staff are registering on to system	Jo & Kate	10/12/19		12/12/19	
Send communication to offer support if staff are struggling to use system	Jo	20/01/20		30/01/20	
Further to implementation, regular contact with teams to gather awareness of how the new system is affecting teams.	Jo & Kate	27/03/20		10/04/20	

Timescale

Click [here](#) to view timescale of objectives/ change process.

Communication Plan

Click [here](#) to view the communication plan.

Resources

ICT Infrastructure	We must ensure we have the appropriate ICT infrastructure/ technology requirements to support the new system.
ICT Equipment	Computers and correct software to complete user guides and system implementation.
Training Rooms/ Equipment	The training room will need to be available for the drop-in sessions. Additionally, the TV presentation equipment and paper materials to present system.
'People Power'	The process is being delivered by the People Team – a small team of 3. Time must be managed well and tasks prioritised when received. Communication to team managers so they are aware there is a delay in the team.

Change Plan – Leave Management System Implementation

EV.2 (Pg.4)

Constraints	
Time	Time constraint will likely be the biggest issue as the launch date is fixed to reflect the implementation date of the Our Future Workplace new terms and conditions. Most of the process is being led and delivered by the People Team who are a small team of 3. During the planned population stage of system implementation, there is pre-planned annual leave within the team which will add pressure on the remaining team members. System implementation will be a priority in the team therefore, Victoria will communicate to managers that unless there is an urgent issue, outstanding tasks will be completed at a slower rate due to the pressure on the team.
Location	Staff are spread over a wide geographical area across Pembrokeshire and into Ceredigion, alongside field-based teams such as Maintenance. This could lead to difficulty when completing the support drop-in session at HQ therefore, support will be offered ad hoc or attendance to team meetings.
ICT Competency	It is known some members of the teams are not ICT competent therefore, it is expected they will struggle to adopt a new system. As to not identify individuals, we will reach out to their line managers to let them know these individuals can request additional support or provide the opportunity for the People Team to attend a team meeting. We plan to continually monitor the system for users who have not registered their system accounts, as this could be an indicator of resistance to change. This would be an opportunity to reach out to the individuals and see how they are reacting to the change.

Available Support	
Training	Training will be offered to all staff. User guides will be produced for staff to follow which will be helpful to those who are ICT competent. However, for users who would like more information or need more hands-on support, support drop-in sessions will be offered at HQ. Alternatively, the People Team can attend team meetings or provide support ad hoc/ one-to-one.

Change Plan – Leave Management System Implementation

EV.2 (Pg.5)

Milestones – celebrate progress	
Milestone	Complete?
Identify suitable system and purchase system	
Populate and set up system	
Launch system to teams	
Complete drop-in sessions	

Monitoring Activities	
System monitoring	We will monitor the system regularly following the launch for people registering their accounts. If we identify delays in registering on the system, we will contact the individuals directly to ascertain the reason for the delay and if we can offer any further support.
Informal communication	We will touch base with all teams informally, either by visiting offices, team meeting or telephone, to ask how they are finding the system after it has been launched. We will address any issues that may be raised.
Further drop-in session	Following the first full month of implementation, we will organise a further drop-in session for anyone to attend if they are struggling to adopt the new system or have any queries.
Line Managers	We will contact line managers after the first quarter to ask if they are receiving leave requests as expected from team members, or if they have experienced any resistance or issues from their team. Similarly, we will ask line managers if they are experiencing any issues from a leave management perspective.

Joanne Thomas

Subject: Review/Discuss Breathe Change Plan
Location: HR Office

Start: Fri 21/06/2019 15:00
End: Fri 21/06/2019 16:30

Recurrence: (none)

Meeting Status: Meeting organizer

Organizer: Joanne Thomas
Required Attendees Kate Houston; Victoria Evans

Screenshot of files to demonstrate use of software which was identified as 'resources' in the change plan.

This screenshot demonstrates that I used Excel, Word and Adobe Acrobat when creating files.

Adobe	 Breathe Employee User Guide.pdf	1
Word	 Breathe screen shots 2.docx	2
	 Breathe screen shots 3.docx	2
	 Breathe screen shots.docx	2
	 Breathe.docx	1
Excel	 Employee export.csv	2
	 employee_template.xlsx	2
	 for jo.docx	(
	 Line Managers accepting requests.docx	2
	 Line Managers Guide to logging sickness...	2
	 Part time AL calc hours.xlsx	2

From: Board Room
To: Joanne Thomas
Subject: Accepted: Breathe drop-in session - "how to & questions"
Start: 09 December 2019 14:00:00
End: 09 December 2019 15:30:00
Location: Board Room

Your request was accepted.

Sent by Microsoft Exchange Server 2016

From: Joanne Thomas
To: Tom Waters
Subject: People Team Delays
Date: 20 November 2019 16:22:01
Importance: High

Hi Tom

As you are aware, the People Team are focussed on implementing the new Breathe system. As we are under pressure to complete the implementation in a short time scale, we have to re-establish our priorities. As such, I have pushed back the Video Training planning until early January. We still have plenty of time to complete the training in this financial year and as the equipment has not been purchased by ICT, I feel there will be little impact due to the delay of the planning day. However, if you feel this is a priority, Poppy may be able to help lay the foundations of the training in my absence, to get the ball rolling.

I appreciate your patience and understanding.

Many thanks

Jo
People Advisor

CHANGE TIMELINE

SEPTEMBER - w/c

	02-Sep	09-Sep	16-Sep	23-Sep
To identify system to trial, trial group and analyse feedback				

OCTOBER w/c

	30-Sep	07-Oct	14-Oct	21-Oct	28-Oct
Identify suitable system to pursue					
Confirm system is suitable for technology infrastructure at Ateb					
Complete Data Protection Impact Assessment					
Ascertain if the system is GDPR compliant				Reviewed by GDPR Officer	

NOVEMBER w/c

	04-Nov	11-Nov	18-Nov	25-Nov
Purchase system				
Understand how to operate system				
Produce user guides to distribute to staff				
Communicate chosen system to staff via team briefings				
Populate system				
Calculate annual leave				
Set up working patterns and leave patterns on system				
Identify support drop-in session dates, book training room and communicate dates to staff				
Send welcome e-mail and remind staff to register				

DECEMBER w/c

	02-Dec	09-Dec	16-Dec	23-Dec	30-Dec
Complete drop-in sessions/ remind staff to attend if support needed					
Monitor that staff are registering on to system					

LONG TERM

	JANUARY	FEBURARY	MARCH	APRIL
Send communication to offer support if staff are struggling to use system				
Further to implementation, regular contact with teams to gather awareness of how the new system is affecting teams.				

COMMUNICATIONS PLAN

Leave Management System Implementation

Background - Further to the recent changes to annual leave and increased agility as a result of the Our Future Workplace project, the existing leave management system was no longer fit for purpose.

Vision -To research and implement a new leave management system to support the recent changes adopted from the Our Future Workplace terms & conditions. To support our increasingly agile environment to meet customer demand, the chosen system will be flexible to allow for changes whilst being value for money. To be time efficient, the chosen system will allow a self-service function for managers and teams to manage their own/team leave efficiently therefore, releasing value time in the People team to focus on further projects.

Research - Two systems will be trialled with a select panel of staff. Feedback will be obtained to determine which system is most suitable.

Access to key documents

[Click here to view the stakeholder analysis](#)

[Click here to view the timeline](#)

[Click here to view the change plan](#)

Comms Objective	Audiences	Key Messages	Channels	Risks	Measurement	Review
For the key players involved in implementing the change to understand their roles and responsibilities, as outlined in the change plan. <u>For all staff to clearly understand:</u> - The leave management system is changing and why - How this will affect them i.e learning a new system - What system is being implemented and what it can do - Where to find information as to how to use the system i.e. user guides and drop-in sessions - That ongoing support is available	The key stakeholders are all staff as every employee will be affected by the change. Therefore, all communications will be directed to all employees. Line Managers will have additional information provided through communications, as they have a role of managing their teams leave using the new system.	- Why it was necessary to change the system following the implementation of Our Future Workplace terms - the new system has a self-service provision - There is on-going support for staff including the drop-in sessions, availability of user guides plus ad hoc support as and when required	Yammer will be used to communicate and to upload user guides - E-mail will be a strong source of communication to ensure the majority of users will receive the information - for the small minority who does not have a Workplace E-mail account, they will be communicated with either face-to-face or via telephone - People Team attendance at Team meetings if required - face-to-face informal communication, dropping into offices to check if everyone is aware of the changes, what to expect etc.	There is a wide geographical area of teams due to field based teams, it may be harder to reach these teams. E-mail and Yammer communication will be made however, additional effort will be made to touch base with the team either by telephone or team meetings. A small minority of employees do not have access to e-mail therefore, the People team must ensure they are contacted via letter, telephone or face-to-face to ensure they receive communications.	Once the system has been implemented, measurement of the effectiveness of communications can be made by monitoring the number of employees registering on the system. - Attendance to drop-in sessions, or communication regarding the drop-in session. - Ad hoc informal communication with teams - Yammer analytics	The communication plan will be reviewed regularly throughout the delivery of the change process. If responses to communications raise concern, the plan will be reviewed and changes implemented where possible, in an attempt to better engage staff.

Joanne Thomas

Subject: Review/Discuss Breathe Change Plan
Location: HR Office

Start: Fri 21/06/2019 15:00
End: Fri 21/06/2019 16:30

Recurrence: (none)

Meeting Status: Meeting organizer

Organizer: Joanne Thomas

Required Attendees Kate Houston; Victoria Evans

From: Victoria Evans
To: Joanne Thomas
Date: 28 January 2020 21:39:16

Re: Witness Testimony in respect of Joanne Thomas' Management of Change portfolio

Jo was asked to develop a change plan to support the development of Our Future Workplace (OFW) which she then communicated to me and the management team for decision. This was detailed enough to ensure that we did not miss a step of the rather complicated project and consultation exercise that we had to undertake. This has to be reviewed and changed on a regular basis due to the other demands on managers within the organisation; whilst this was a People project, it impacted across the organisation and therefore Jo's plan had to be flexible enough to cope with this.

During the introduction of the system, Jo broke down all the steps that managers and staff had to take; set up dummy accounts so that she was able to produce step by step guides on all aspects of the system for staff and managers alike. She tested her training and guidance notes out on a trial sample and then reviewed/updated her guidance notes according to feedback. Her plan for training was mapped out to link in with the deadline I set her for full implementation. Jo then set up and arranged a number of drop in sessions for staff and managers and went around the organisation ensuring that everyone was comfortable with the system. The system was not bespoke and we were unable to adapt it for one particular working pattern; Jo devised an acceptable solution which she presented to me. I agreed with this so she communicated this to the individual concerned.

The system is due some additional changes which will make the system easier to use; once these updates are sent through Jo will need to update the training/briefing notes and run update sessions for all staff. We only used part of the system initially due to timescales however we are planning to expand our use with document uploads and L&D records. Jo will review the system once again and develop a plan as to how we can use this, together with a training/briefing plan and timescale for implementation.

Tori

Victoria Evans
People and Communications Manager



Tel | [01437 763688](tel:01437763688)
Meyler House, St. Thomas Green,
Haverfordwest, Pembrokeshire, SA61 1QP
atebgroup.co.uk



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Mae'r e-bost hwn, ac unrhyw atodiad, ar gyfer y defnyddiwr yn unig. Mae unrhyw ddosbarthiad, defnydd neu atgynhyrchiad arall heb ganiatad yr anfonwr yn flaenorol heb ei awdurdodi. Os byddwch yn derbyn y neges hon mewn gwall, rhowch wybod i'r anfonwr ar unwaith a dileu'r neges o'ch cyfrifiadur. Mae grwp cyfyngedig ateb yn gymdeithas gofrestredig gyda'r FCA, Reg. Rhif 23308R, landlord cymdeithasol cofrestredig gyda Llywodraeth Cymru, Reg. Dim PO72 ac mae'n aelod o Gymuned Tai Cymru.

Joanne Thomas

Subject: Breathe plan - review objectives

Start: Mon 16/09/2019 09:00

End: Mon 16/09/2019 09:30

Recurrence: (none)

Organizer: Joanne Thomas

Joanne Thomas

Subject: Breathe plan - review objectives

Start: Wed 30/10/2019 09:00

End: Wed 30/10/2019 09:30

Recurrence: (none)

Organizer: Joanne Thomas

Joanne Thomas

Subject: Breathe plan - review objectives

Location: N/A

Start: Fri 22/11/2019 09:00

End: Fri 22/11/2019 09:30

Recurrence: (none)

Organizer: Joanne Thomas

From: Joanne Thomas
To: Kate Houston
Subject: Breathe plan date change
Date: 12 November 2019 13:09:33
Importance: High

Hi Kate

Further to our progress review on Breathe today, I've amended the change plan as we agreed to push back the date to identify the drop-in session date/time. I checked both our dairies and we are available on the 25th November to discuss dates and our availability to deliver the sessions – it's been helpful to push it back as we'll have a better idea of how long the session should be once we get a better handle of the system.

I'll pop a meeting request over to you for the 25th.

Thanks

Jo
People Advisor

From: Tom Waters
To: Joanne Thomas
Subject: Witness Testimony - Breathe
Date: 16 January 2020 23:23:12

Hi Jo,

Please find below my Witness Testimony in relation to the implementation of the Breathe system and your support provided.

Over The past 12 months ateb have been going through various changes to the way we work and operate. One major change has been the introduction of a new system called Breathe. Although this system has officially been introduced in January 2020 its planning started back in the summer.

During our regular Digital Support Team meetings we always discuss digital transformational changes and it was during one of these meetings our People Team Lead - Joanne Thomas (Jo), first introduced to us the idea of needing a new way to manage our HR processes, that was easy to use, more efficient and offered greater flexibility.

In our early meetings I recall Jo asking us what we wanted from our systems, I even remember her doing some brainstorming on 'what good looks like' in relation to booking leave, recording absences etc. I felt jo was very approachable and easy to work with.

Jo returned to several meetings with updates, firstly explaining which systems she had looked at, then again to explain which ones were not going to meet our business needs. Overall, I would say she kept us informed and involved throughout the process.

Once we knew which system, we found favourable some of us were asked to trial the system. I was one of those chosen and used the system for around 5 weeks. During this time, I would book 'fake' leave and record 'false' absences. This required Jo to accept my requests and make changes etc, just as if we were using a live system.

Over time Jo had become proficient in using the software and any queries we raised with her she was able to answer pretty much there and then. I only recall her saying once that she would go away and come back with an answer (which she did).

Once we finished the testing period, I received a survey monkey to review my usage of the new system, whether it was easy to use etc. Jo also returned to our team meeting to gather feedback from those of us who trialled the new system. Our feedback was very positive.

It was around a couple of months after the testing that the system was introduced to us. Before being implemented Jo gave us formal training and held drop-in advice sessions where we could go along and ask questions. Even though I had both the testing period and the formal training I still found myself going to the drop-

in session to ask one small question. This was a really nice informal way of meeting our needs. During my drop in that lasted around 5 minutes we ended up co-sharing problems (myself and another colleague who had also dropped in) and I don't think we would have had that informal 'chatter' had we been doing the formal training. It was also nice to not spend an hour in a formal training session trying to find the answer to a single question. Plus, it was useful to have another avenue for support as not everyone will remember all their questions during formal training.

I found the introduction of the new HR system Breathe enjoyable experience. It's always nice to have new, more efficient ways to work and I felt Jo was organised and creative throughout.

Since its implementation Jo has continued to monitor its effectiveness by attending our most recent team meeting and gathering feedback from team members. She was very thorough in her feedback requests and went through various parts of the system, such as how have you found booking leave, did you understand the hours you booked, are you all aware Monday to Thursday is 7.5 hours and Fridays just 7 hours etc. She didn't just ask for simple feedback, she drilled down into our usage and prompted us by highlighting various processes.

Overall I and my team have found the whole process straightforward and uncomplicated. I put this down to the correct software being chosen to meet both ours (the employee) and the organisation's needs along with the structured and well-coordinated implementation and observation/feedback periods that followed.

Tomos Waters
Line Manager - Digital Support Team.

Joanne Thomas

From: Joanne Thomas
Sent: 29 November 2019 13:08
To: All ateb Group Staff
Subject: BreatheHR - Important, please read.
Attachments: Breathe Employee User Guide.pdf

Importance: High

Hello all,

BreatheHR – What is it?

As many of you are aware, we are introducing a new HR system called **BreatheHR** with effect from January. BreatheHR will replace CaptureIT and will be used to record annual leave, sickness and other absences. It is web-based and is user-friendly on mobile devices.

What will I be able to do?

You will be able to view your annual leave balance and send annual leave requests directly to your line manager via Breathe; any sickness absence will also be recorded here and you will be able to submit your return to work form via Breathe.

How do I get started?

I have attached the user guide from Breathe, please browse this guide to familiarise yourself with the system. Please note, Breathe has other functions which will be listed in the guide however we have not switched on/purchased all of these; you only need to focus on the sections relating to leave/sickness. More guides regarding annual/special leave and sickness will be sent out next week.

On Monday, you will receive your welcome e-mail from Breathe – please set up your account; instructions are available on Page 3 of the attached guide. Once you have set-up your account, please do not do anything else for now.

If you do not receive an e-mail by Tuesday, please let me know.

Need some help?

Kate and I are holding a number of informal drop-in sessions in the Boardroom– see dates below. If you need some help or have any queries, please come by and see us! If you cannot make a drop-in session but would like some help, please get in touch and we will find a suitable time.

Thursday 5 th Dec	Monday 9 th Dec	Tuesday 10 th Dec
10am – 11.30am 1pm – 2.30pm	11am – 12.30pm 2pm – 3.30pm	11.30am – 1pm 2pm – 3.30pm

Kind regards

Jo
 People Advisor

From: Joanne Thomas
To: All ateb Group Staff
Subject: RE: UPDATE: BreatheHR - Important, please read.
Date: 04 December 2019 14:33:00
Attachments: Booking annual leave.pdf
 Logging in.pdf
 Updating emergency details and next of kin.pdf
 Using the calendar.pdf
 Working hours.docx
Importance: High

Hi all

As promised, please find attached some users guides for BreatheHR.

When you have set yourself up on Breathe, please familiarise yourself with the system, using the guides to help if necessary. Please follow the guide to update your personal details and emergency contacts.

You will notice in the guide that you need to specify the amount of annual leave hours you are taking, when booking leave in Breathe. For full time individuals, please see sheet attached of your standard working hours. I will get in touch with part-time individuals separately.

Need some help?

Kate and I are holding a number of informal drop-in sessions in the Boardroom—see dates below. If you need some help or have any queries, please come by and see us! If you cannot make a drop-in session but would like some help, please get in touch and we will find a suitable time.

Thursday 5 th Dec	Monday 9 th Dec	Tuesday 10 th Dec
10am – 11.30am 1pm – 2.30pm	11am – 12.30pm 2pm – 3.30pm	11.30am – 1pm 2pm – 3.30pm (ROOM 64)

If you have any queries, please get in touch.

Many thanks

Jo
 People Advisor

From: Joanne Thomas
Sent: 02 December 2019 13:59
To: All ateb Group Staff <AllatebGroupStaff@atebgroup.co.uk>
Subject: UPDATE: BreatheHR - Important, please read.

Hi all

The Breathe welcome e-mails have been sent this afternoon. Please set up your account

following the on-screen instructions or using the guide sent last week.

I am aware two e-mails may have been sent – please discard the first e-mail and use the second.

Any issues please let me know.

Kind regards

Jo
People Advisor

From: Joanne Thomas
Sent: 29 November 2019 13:08
To: All ateb Group Staff <AllatebGroupStaff@atebgroup.co.uk>
Subject: BreatheHR - Important, please read.
Importance: High

Hello all,

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Thursday 5 th Dec	Monday 9 th Dec	Tuesday 10 th Dec
10am – 11.30am 1pm – 2.30pm	11am – 12.30pm 2pm – 3.30pm	11.30am – 1pm 2pm – 3.30pm

Kind regards

Jo

People Advisor

From: Joanne Thomas
To: All ateb Group Staff
Subject: Breathe - one month on
Date: 17 January 2020 15:34:00
Importance: High

Dear all

We are over a month in since we sent that first e-mail welcoming you all to our new leave system - Breathe. It has also been a month since we finished the drop-in sessions where many of you joined Kate and I to ask us questions or show you how to use the system.

All of you are now registered on the system - thank you. Plus many of you have used it to request leave - fantastic.

However, we appreciate there may still be some burning questions about Breathe, or maybe you're unsure of something since you started using it - or perhaps you just need some clarity. We're delivering another drop-in session on the 31st January 2020 in the Boardroom at 10am - 11am, and 2pm - 3pm. Please join us at any time during the session if you need some help or have any queries.

Also please remember you are always welcome to pop in, phone us or request a one-to-one if you can't make this date.

The user guides are still on Yammer if you want to check them out again.

Thank you for being patient and getting onboard with our fab new system.

Many thanks

Jo
People Advisor

User Guide created for stakeholders (document titles plus 1 guide).

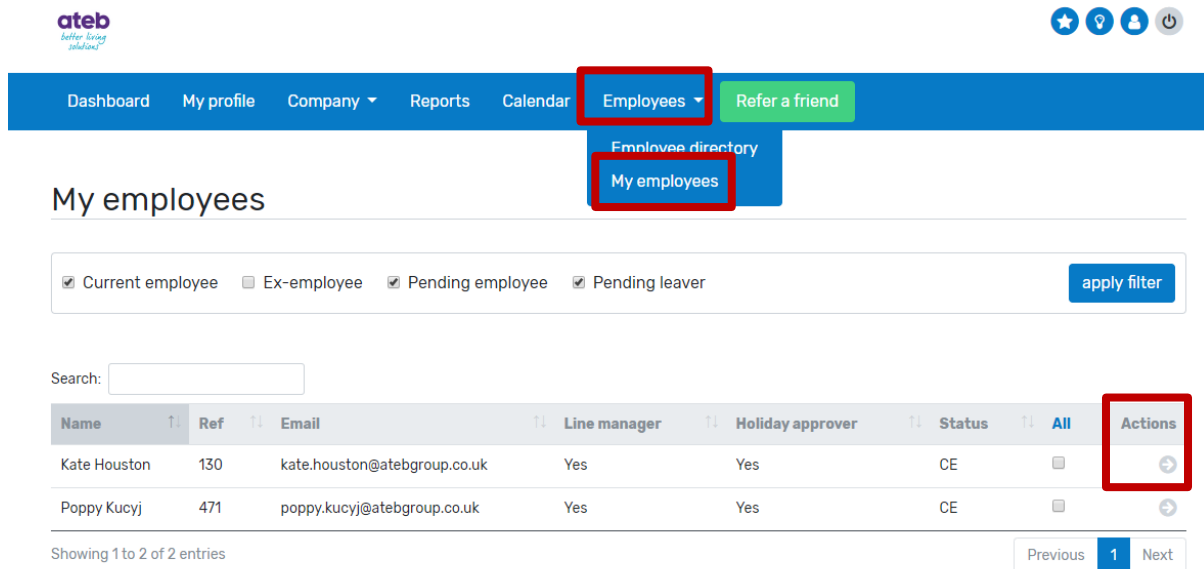
User guide titles below; please find the 'recording sickness absence' guide attached as further evidence.

-  Booking annual leave.docx
-  Booking annual leave.pdf
-  Line Manager - Approving Annual Leave....
-  Line Manager - Approving Annual Leave....
-  Line manager - recording sickness absen...
-  Line manager - recording sickness absen...
-  Logging in.docx
-  Logging in.pdf
-  Updating emergency details and next of ...
-  Updating emergency details and next of ...
-  Using the calendar.docx
-  Using the calendar.pdf

BreatheHR

Recording sickness

1. Click on **Employees** and then **My Employees** selecting the relevant employee by clicking on the **actions** arrow



ateb
better living solutions

Dashboard My profile Company ▼ Reports Calendar **Employees ▼** Refer a friend

Employee directory
My employees

My employees

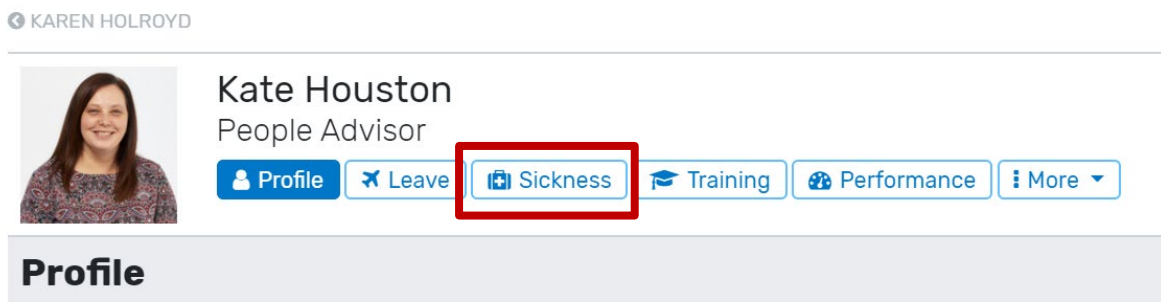
☒ Current employee ☐ Ex-employee ☒ Pending employee ☒ Pending leaver [apply filter](#)

Search:

Name	Ref	Email	Line manager	Holiday approver	Status	All	Actions
Kate Houston	130	kate.houston@atebgroup.co.uk	Yes	Yes	CE	☐	
Poppy Kucyj	471	poppy.kucyj@atebgroup.co.uk	Yes	Yes	CE	☐	

Showing 1 to 2 of 2 entries [Previous](#) **1** [Next](#)

2. Click on **Sickness**



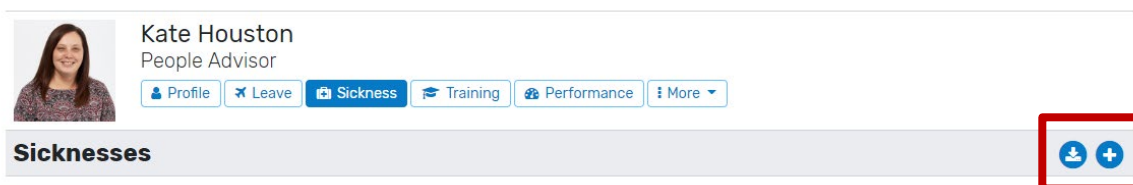
KAREN HOLROYD

 **Kate Houston**
People Advisor

[Profile](#) [Leave](#) **[Sickness](#)** [Training](#) [Performance](#) [More ▼](#)

Profile

3. Click on the **plus sign** to add a sickness event



 **Kate Houston**
People Advisor

[Profile](#) [Leave](#) **[Sickness](#)** [Training](#) [Performance](#) [More ▼](#)

Sicknesses

4. Update the relevant details and click **add sickness**. Please note, use the '**1-Sickness**' code when choosing sickness type.

Sicknesses

Add sickness for Kate Houston

SICKNESS DETAILS

First day of sick leave*

10/12/2019

☒ Full day
☐ Half day

Last day of sick leave

10/12/2019

Sickness type*

1- Sickness

Employee Note

5. You will return to the sickness event overview. Here you can raise a query regarding the sickness to the employee and upload the completed return to work.

Please note, do not complete the sickness. This will be done by the People Team once all documents have been received and recorded.

Kate Houston
People Advisor

[Profile](#) [Leave](#) [Sickness](#) [Training](#) [Performance](#) [More](#)

Sickness

Sickness summary

APPROVE SICKNESS

Last day of sick leave

02/12/2019

Sickness type*

Headache / migraine

☐ Completed
☐ Raise a query

DETAILS

Current status	Open
Start date	02/12/2019 - 02/12/2019
Length of sickness	1.0 day
Sickness type	Headache / migraine
Employee note	Return to work pending

Attached documents

6. If raising a query, click on **raise a query** and input your message and click submit. The employee will receive a direct message.

APPROVE SICKNESS

Last day of sick leave

02/12/2019

Sickness type*

Headache / migraine

☐ Completed
☒ Raise a query

Reason for query

Please bring in your medical certificate |

These notes are always visible to the employee and should explain what additional info is required (such as a note from the doctor)

7. When attaching documents, click on the **plus sign**. Complete the boxes and upload the document and click **add document**. This will appear with the sickness event.

Attached documents 

Sickness

Add document for Kate Houston

DOCUMENT DETAILS

Title*

Completed return to work


Return to work and self certificate[1].pdf
1 file selected

☒ Visible to employee

TAGS

Select Some Options

READ REQUIREMENTS

Read required?

☒ Yes

☐ No

8. Any open sickness events will remain on your **Manager Dashboard** for your information

My dashboard | **Manager dashboard 3** | Community

To review and approve

Open leave requests

Kate Houston
Special Leave from 10/12/2019 to 10/12/2019
Submitted on 02/12/2019, 2:45pm

Kate Houston
Study from 09/01/2020 to 09/01/2020
Submitted on 02/12/2019, 2:47pm

Sicknesses

Kate Houston
Off work since 02/12/2019 **open**

When reviewing sickness for an individual, you can view patterns and trends of sickness absence which may be useful during the return to work interview.

See below.

Sickness patterns/trends

1. Find your employee and click on **sickness**



Kate Houston
People Advisor

[Profile](#) [Leave](#) [Sickness](#) [Training](#) [Performance](#) [More](#)

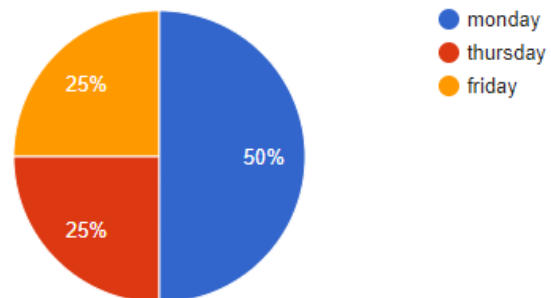
Profile

2. Click on **trends**

Sicknesses 4

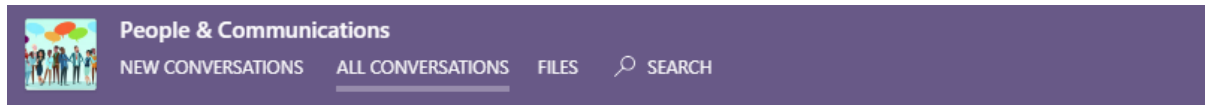
Trends

All sicknesses from 03/12/2018 - 03/12/2019



Evidence of drop in sessions to support stakeholders with their identified requirements.

Part 1:



Joanne Thomas – December 4, 2019 at 5:16 PM

Thanks for everyone's support and feedback about BreatheHR. Welcome e-mails have been sent to get you set-up - if you haven't received this or are having trouble getting started, please get in touch.

I have attached the BreatheHR guides to show you how to complete the main activities like booking annual leave.

Don't forget we have a number of drop-in session available this week and next if you need any support or advice about Breathe. All in the Boardroom except the 2pm session on Tues 10th.

Thursday 5th Dec

10am – 11.30am

1pm – 2.30pm

Monday 9th Dec

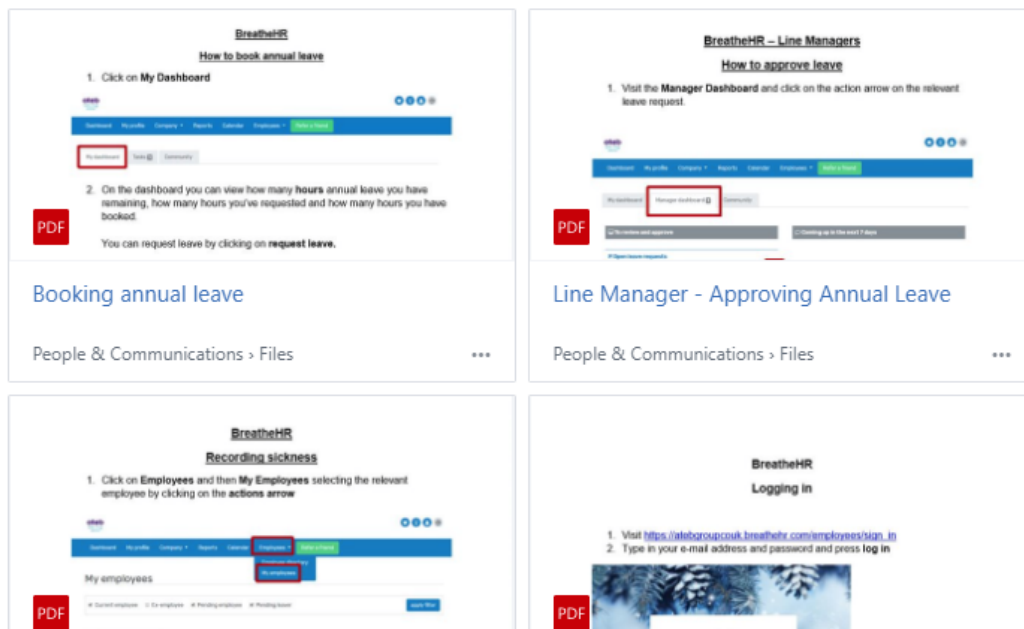
11am – 12.30pm

2pm – 3.30pm

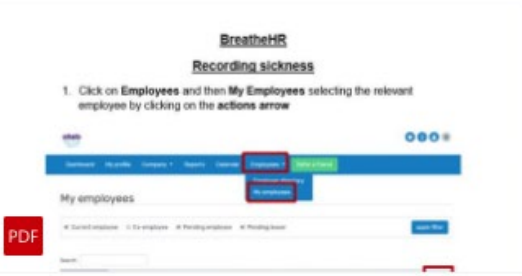
Tuesday 10th Dec

11.30am – 1pm

2pm – 3.30pm (ROOM 64)



Part 1 continued:



BreatheHR
Recording sickness

1. Click on **Employees** and then **My Employees** selecting the relevant employee by clicking on the **actions** arrow

My employees

PDF

Line manager - recording sickness absence

People & Communications > Files



BreatheHR
Logging in

1. Visit <https://atebgroup.co.uk/breathehr.com/employees/login>
2. Type in your e-mail address and password and press **log in**

PDF

Logging in

People & Communications > Files



BreatheHR
Updating Personal Details

1. Click on **my profile** on the toolbar at the top of the page. Your toolbar may look different depending on your user permissions.
2. Click on **profile**

PDF

Updating emergency details and next of kin

People & Communications > Files



BreatheHR
Using the calendar function

1. Click on **calendar** on the toolbar at the top of the screen.

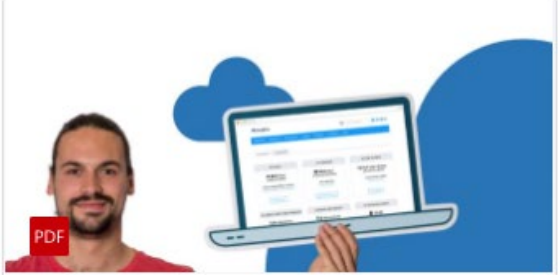
Please note, your toolbar may look different depending on your user permissions.

2. You will be able to view the leave requests for anyone across ateb Group. This can be helpful if you need to know if somebody is on leave. Don't worry –

PDF

Using the calendar

People & Communications > Files



PDF

Breathe Employee User Guide

People & Communications > Files

LIKE REPLY SHARE EDIT ...

Victoria Evans likes this

Seen by 63

Part 3.

**People & Communications**

NEW CONVERSATIONS ALL CONVERSATIONS FILES SEARCH

**Joanne Thomas** – December 5, 2019 at 2:21 PM

 **BreatheHR Drop-in sessions**

Don't worry if you didn't manage to make one of our drop-in sessions today. We have four sessions available Monday and Tuesday next week in the Boardroom (see times below). You can drop in at any time during the session - we've been as quick as 10 minutes answering questions and demonstrating how to do certain tasks - so fear not busy people! If you can't make a session and still need some help, feel free to pop in and see us in the office.

Thanks to those who dropped by today - we've had great feedback so far with people commenting that it's an easy system to use.

Monday 9th Dec
11am – 12.30pm
2pm – 3.30pm
Tuesday 10th Dec
11.30am – 1pm
2pm – 3.30pm (ROOM 64)



 LIKE  REPLY  SHARE  EDIT ...

Victoria Evans and Poppy Kucyj like this

Seen by 84

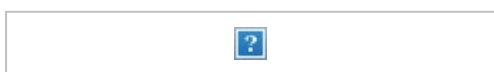
From: Debbie Yates
To: Joanne Thomas
Subject: RE: Breathe
Date: 19 December 2019 10:04:43

Hi Jo,

Thank you for the session I found it very informative. I have now managed to book my first lot of annual leave on Breathe and understand how to book in hours etc. The session was very good, thank you very much.

Many thanks

Debbie Yates
Governance Assistant



Tel | [01437 763688](tel:01437763688)

Meyler House, St. Thomas Green,
 Haverfordwest, Pembrokeshire, SA61 1QP

atebgroup.co.uk



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Mae'r e-bost hwn, ac unrhyw atodiad, ar gyfer y defnyddiwr yn unig. Mae unrhyw ddosbarthiad, defnydd neu atgynhyrchiad arall heb ganiatad yr anfonwr yn flaenorol heb ei awdurdodi. Os byddwch yn derbyn y neges hon mewn gwall, rhwch wybod i'r anfonwr ar unwaith a dileu'r neges o'ch cyfrifiadur. Mae grwp cyfyngedig ateb yn gymdeithas gofrestredig gyda'r FCA, Reg. Rhif 23308R, landlord cymdeithasol cofrestredig gyda Llywodraeth Cymru, Reg. Dim PO72 ac mae'n aelod o Gymuned Tai Cymru.

From: Joanne Thomas <Joanne.Thomas@atebgroup.co.uk>
Sent: 06 December 2019 15:33
To: Debbie Yates <Debbie.Yates@atebgroup.co.uk>
Subject: RE: Breathe

Hi Debbie

Thanks for getting in touch.

We do have drop-in sessions scheduled for the dates below. You're welcome to pop in to any session at any time during the session. Breathe is pretty straight forward to use so hopefully after the session you won't have any problems however, always feel free to get in touch if you have any problems with Breathe.



Thursday 5 th Dec	Monday 9 th Dec	Tuesday 10 th Dec
10am – 11.30am 1pm – 2.30pm	11am – 12.30pm 2pm – 3.30pm	11.30am – 1pm 2pm – 3.30pm (ROOM 64)

See you soon.

Thanks

Jo
People Advisor

From: Debbie Yates <Debbie.Yates@atebgroup.co.uk>
Sent: 06 December 2019 14:09
To: Joanne Thomas <Joanne.Thomas@atebgroup.co.uk>
Subject: Breathe

Hi Jo,
 I'm having problems understanding how to book annual leave on the new Breathe system. I understand that there is a drop in session taking place, is this correct? If so let me know when it is and I will attend.
 Many thanks

Debbie Yates
Governance Assistant



Tel | [01437 763688](tel:01437763688)
 Meyler House, St. Thomas Green,
 Haverfordwest, Pembrokeshire, SA61 1QP
atebgroup.co.uk



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Mae'r e-bost hwn, ac unrhyw atodiad, ar gyfer y defnyddiwr yn unig. Mae unrhyw ddosbarthiad, defnydd neu atgynhyrchiad arall heb ganiatad yr anfonwr yn flaenorol heb ei awdurdodi. Os byddwch yn derbyn y neges hon mewn gwall, rhowch wybod i'r anfonwr ar unwaith a dileu'r neges o'ch cyfrifiadur. Mae grwp cyfyngedig ateb yn gymdeithas gofrestredig gyda'r FCA, Reg. Rhif 23308R, landlord cymdeithasol cofrestredig gyda Llywodraeth Cymru, Reg. Dim PO72 ac mae'n aelod o Gymuned Tai Cymru.

From: Joanne Thomas
To: Amy Williams
Subject: RE: Breathe
Date: 16 January 2020 13:17:00

Hi Amy

Further to our conversation about Breathe support and your email below, I am available on the 19th Feb to meet the team and do a Breathe update/how-to. I have some availability in January if you'd like to do this sooner.

Happy to travel to a scheme, just drop me a meeting request - I'm quite flexible with dates and location.

Thanks

Jo
People Advisor

-----Original Message-----

From: Amy Williams <Amy.Williams@atebgroup.co.uk>
Sent: 15 January 2020 16:48
To: Joanne Thomas <Joanne.Thomas@atebgroup.co.uk>
Subject: Breathe

Hi Jo

Do you have any availability on the 19th to see the team either at Meyler or DCC?

Sent from my iPad

From: Joanne Thomas
To: Tom Waters
Subject: Breathe support
Date: 17 January 2020 17:08:00
Importance: High

Hi Tom

Hope you're well – must've missed you today as your office was empty.

Just wanted to touch base about Breathe – as you're the digital team, I'm sure you and your team are breezing through the new system. However, if you or your team member had any queries or wanted some extra training, please feel free to get in touch. We will do another drop-in session once teams have had enough time to try it out properly but in the meantime, we can provide ad-hoc support sessions – or just pop in to the office as most things can be resolved fairly quickly.

Many thanks.

Jo
People Advisor

From: Scott Nash
To: Joanne Thomas
Subject: Testimonial for Jo Thomas re - Breathe System
Date: 23 January 2020 09:23:15

Breathe System

ateb introduced a new Breathe System for employees to request annual leave.

Jo was tasked with the training change process for my team

Jo kept in regular contact with the West Wales Care & Repair team (part of ateb Group) during the change process when the Breathe system was being implemented.

The team has a wide geographical range in 2 counties, Pembrokeshire and Ceredigion so Jo actively kept in touch with the Aberystwyth team through telephone communication and video call.

Jo explained why the system was changing and what changes the team should expect from the new system. Part of my team can be resistant to change and isolate themselves due to the distance, Jo and I anticipated this and thoroughly prepared to try overcome issues quickly. Some of my team attended the drop-in sessions which they found beneficial. One member of my team experiences difficulties using computers so Jo provided additional support after the drop-in session and went as far as creating shortcuts and storing his password to make the process easier. The Aberystwyth team found the instruction guides helpful. Jo continued to communicate with my team during the entire process, keeping in touch regularly to check they are managing and continuing to offer support. The system has not long been implemented and I understand Jo is arranging to visit the Aberystwyth team to maintain their relationship and provide more support.

Scott Nash

Senior Technical Officer

From: Joanne Thomas
To: All ateb Group Staff
Subject: RE: UPDATE: BreatheHR - Important, please read.
Date: 04 December 2019 14:33:00
Attachments: Booking annual leave.pdf
 Logging in.pdf
 Updating emergency details and next of kin.pdf
 Using the calendar.pdf
 Working hours.docx
Importance: High

Hi all

As promised, please find attached some users guides for BreatheHR.

When you have set yourself up on Breathe, please familiarise yourself with the system, using the guides to help if necessary. Please follow the guide to update your personal details and emergency contacts.

You will notice in the guide that you need to specify the amount of annual leave hours you are taking, when booking leave in Breathe. For full time individuals, please see sheet attached of your standard working hours. I will get in touch with part-time individuals separately. **Evidence - see further emails in this documents to support**

Need some help?

Kate and I are holding a number of informal drop-in sessions in the Boardroom—see dates below. If you need some help or have any queries, please come by and see us! If you cannot make a drop-in session but would like some help, please get in touch and we will find a suitable time.

Thursday 5 th Dec	Monday 9 th Dec	Tuesday 10 th Dec
10am – 11.30am 1pm – 2.30pm	11am – 12.30pm 2pm – 3.30pm	11.30am – 1pm 2pm – 3.30pm (ROOM 64)

If you have any queries, please get in touch.

Many thanks

Jo
 People Advisor

From: Joanne Thomas
Sent: 02 December 2019 13:59
To: All ateb Group Staff <AllatebGroupStaff@atebgroup.co.uk>
Subject: UPDATE: BreatheHR - Important, please read.

Hi all

The Breathe welcome e-mails have been sent this afternoon. Please set up your account

following the on-screen instructions or using the guide sent last week.

I am aware two e-mails may have been sent – please discard the first e-mail and use the second.

Any issues please let me know.

Kind regards

Jo
People Advisor

From: Joanne Thomas
Sent: 29 November 2019 13:08
To: All ateb Group Staff <AllatebGroupStaff@atebgroup.co.uk>
Subject: BreatheHR - Important, please read.
Importance: High

Hello all,

BreatheHR – What is it?

As many of you are aware, we are introducing a new HR system called **BreatheHR** with effect from January. BreatheHR will replace CaptureIT and will be used to record annual leave, sickness and other absences. It is web-based and is user-friendly on mobile devices.

What will I be able to do?

You will be able to view your annual leave balance and send annual leave requests directly to your line manager via Breathe; any sickness absence will also be recorded here and you will be able to submit your return to work form via Breathe.

How do I get started?

I have attached the user guide from Breathe, please browse this guide to familiarise yourself with the system. Please note, Breathe has other functions which will be listed in the guide however we have not switched on/purchased all of these; you only need to focus on the sections relating to leave/sickness. More guides regarding annual/special leave and sickness will be sent out next week.

On Monday, you will receive your welcome e-mail from Breathe – please set up your account; instructions are available on Page 3 of the attached guide. Once you have set-up your account, please do not do anything else for now.

If you do not receive an e-mail by Tuesday, please let me know.

Need some help?

Kate and I are holding a number of informal drop-in sessions in the Boardroom—see dates below. If you need some help or have any queries, please come by and see us! If you cannot make a drop-in session but would like some help, please get in touch and we will find a suitable time.

Thursday 5 th Dec	Monday 9 th Dec	Tuesday 10 th Dec
10am – 11.30am 1pm – 2.30pm	11am – 12.30pm 2pm – 3.30pm	11.30am – 1pm 2pm – 3.30pm

Kind regards

Jo

People Advisor

From: Joanne Thomas
To: Philomena Roche
Subject: Part time hours
Date: 06 December 2019 16:39:00
Importance: High

Hi Philly

Please see below your standard working hours which have been inputted into Breathe. Please use these hours when requesting leave.

Let me know if you have any queries

	Mon	Tue	Wed	Thurs	Fri
Philly Roche	6.5	6.5	6.5	6.5	6
Half day	3.25	3.25	3.25	3.25	3

Jo
People Advisor

Standard Working Hours

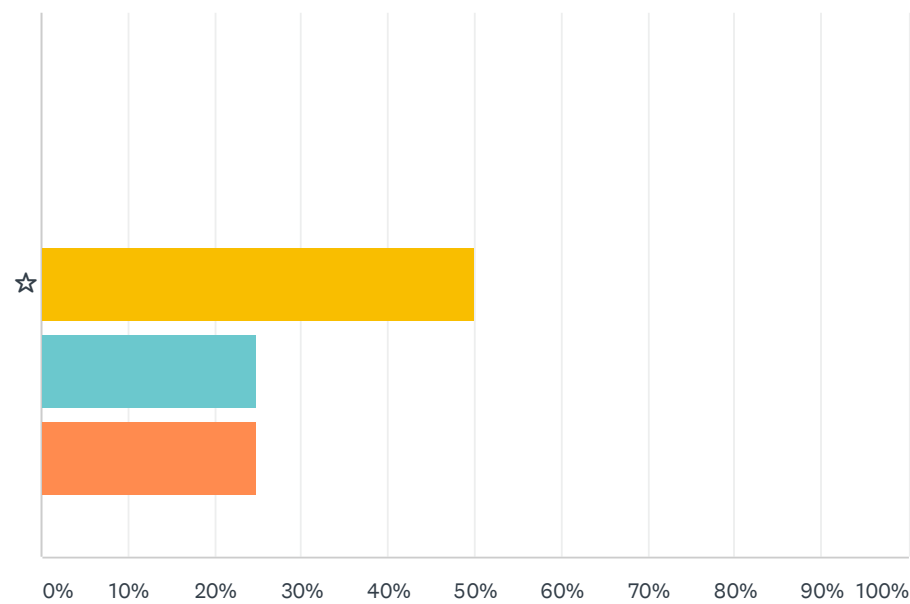
When booking annual leave on Breathe, please enter the below hours into the 'deducted hours' section for the relevant day(s) you are requesting.

i.e. Monday = 7.5 hours, Friday = 7 hours, Thursday + Friday = 14.5 hours

Name	Mon	Tue	Wed	Thu	Fri
	Working hours				
Full time – 37 hours	7.5	7.5	7.5	7.5	7.0
	7.5	7.5	0	7.5	7.5
	6.5	6.5	6.5	6.5	6
	0	7.5	7.5	0	0
	6	6	6	6	6
	6	0	6	0	6
	6	6	0	0	0

Q1 Please rate how much you liked the Breathe HR system. 5 = loved it, 3 = satisfactory, 1 = disliked it.

Answered: 8 Skipped: 0



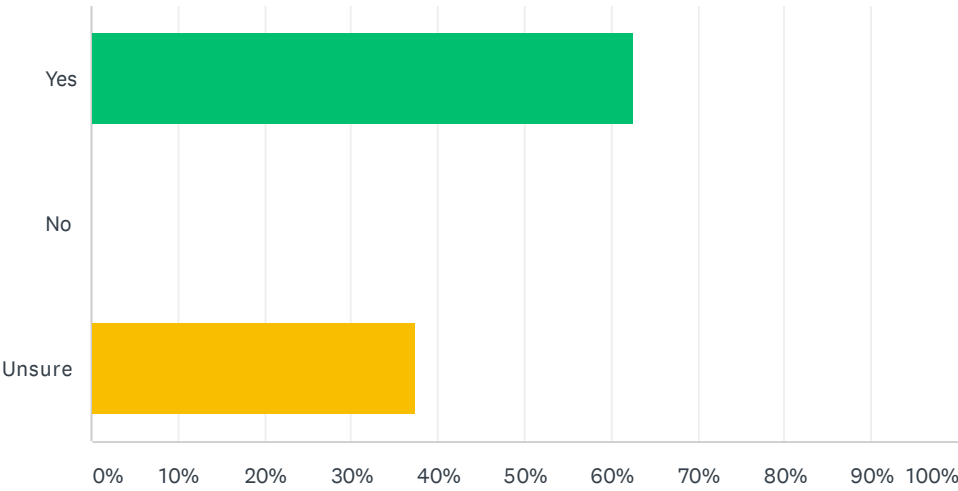
1 2 3 4 5

	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	0.00% 0	0.00% 0	50.00% 4	25.00% 2	25.00% 2	8	3.75

EV.22 - I've extracted the first two pages of both system trial feedback, to evidence surveys were used.

Q2 Do you feel Breathe HR works well for you and your department?

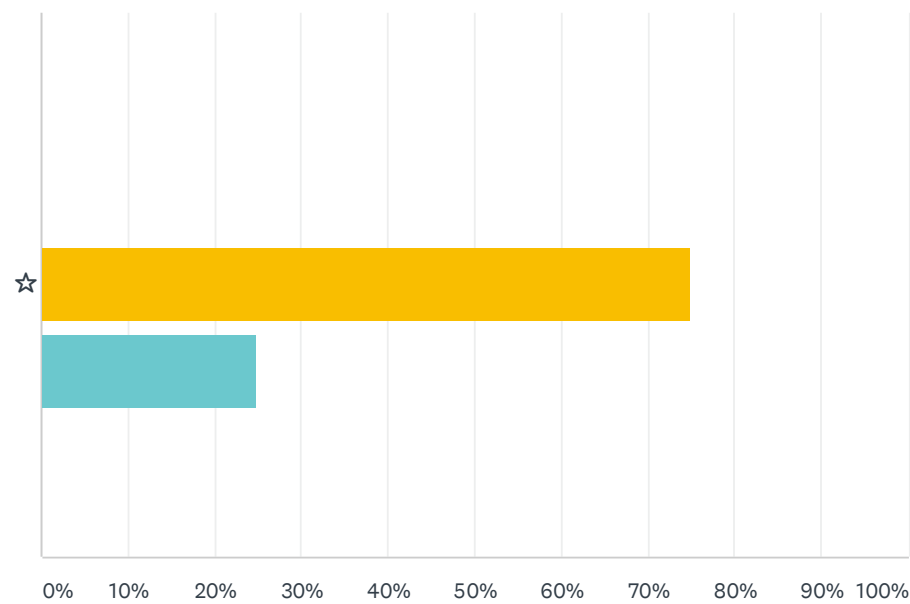
Answered: 8 Skipped: 0



ANSWER CHOICES		RESPONSES	
Yes		62.50%	5
No		0.00%	0
Unsure		37.50%	3
TOTAL			8

Q1 Please rate how much you liked the Who's Off system. 5 = loved it, 3 = satisfactory, 1 = hated it.

Answered: 8 Skipped: 0

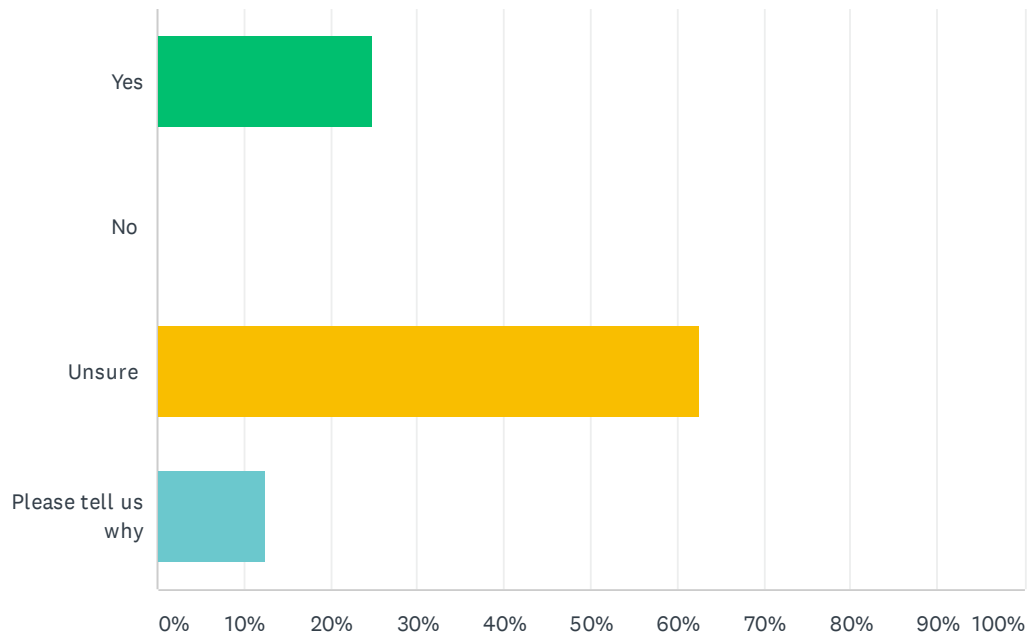


1 2 3 4 5

	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	0.00% 0	0.00% 0	75.00% 6	25.00% 2	0.00% 0	8	3.25

Q2 Do you feel Who's Off works well for you and your department?

Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	25.00%	2
No	0.00%	0
Unsure	62.50%	5
Please tell us why	12.50%	1
TOTAL		8

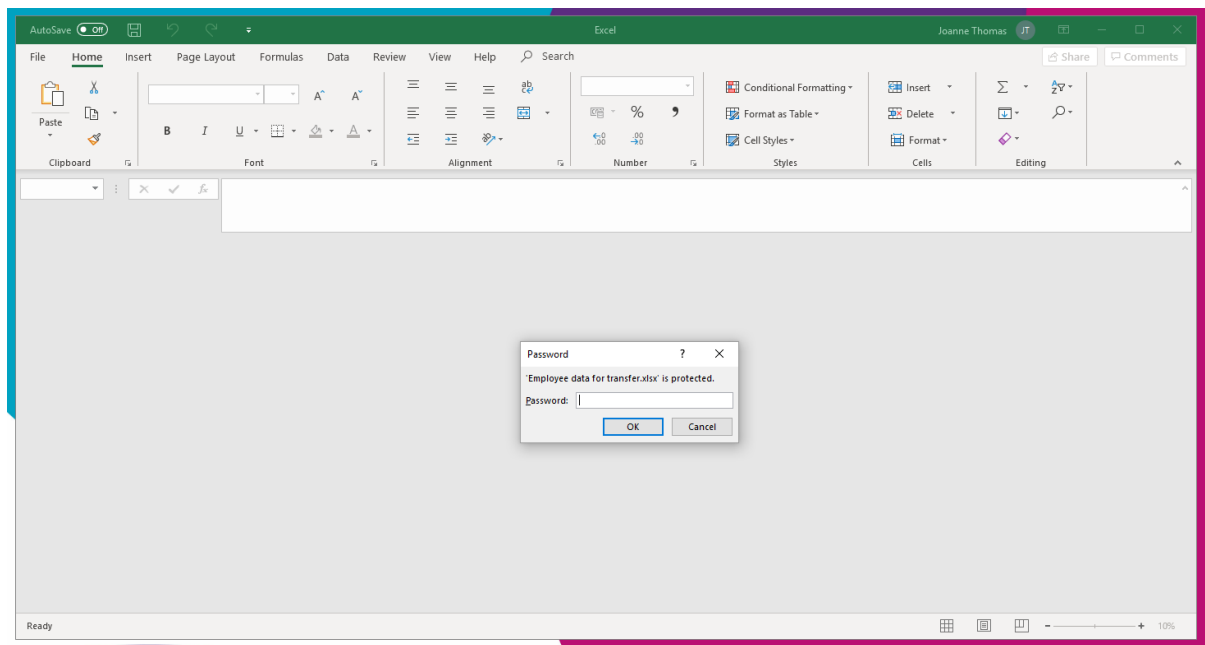
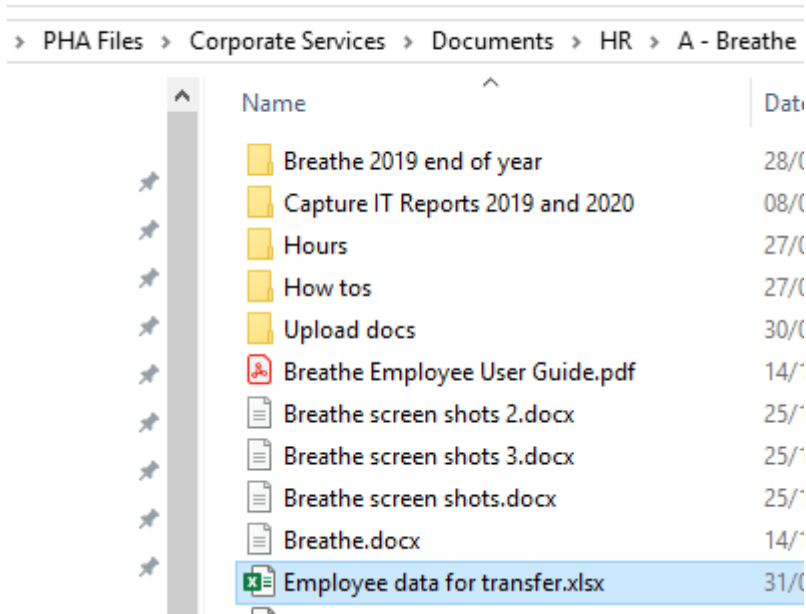
Screenshot of storage location for leave data reports.

The reports were saved into our department electronic files and appropriately named for ease; this is department and organisation expectation.

Corporate Services > Documents > HR > A - Breathe > Capture IT Reports 2019 and 2020			
Name	Date modified	Type	
 2019 holiday entitlement.pdf	08/01/2020 09:59	Adobe Acrobat D...	
 all staff 2019 daily sickness listing.pdf	23/12/2019 13:41	Adobe Acrobat D...	
 ce reports 2019 daily holiday listing.pdf	23/12/2019 12:30	Adobe Acrobat D...	
 ce reports 2020 daily holiday listing.pdf	23/12/2019 12:57	Adobe Acrobat D...	
 chief exec 2020 daily holiday listing.pdf	23/12/2019 12:21	Adobe Acrobat D...	
 chief executive 2019 daily holiday listing....	23/12/2019 12:20	Adobe Acrobat D...	
 finance & ict Mgmt 2020 daily holiday li...	23/12/2019 12:27	Adobe Acrobat D...	
 finance & ict Mgmt 2019 daily holiday lis...	23/12/2019 12:26	Adobe Acrobat D...	
 finance 2019 daily holiday listing.pdf	23/12/2019 13:02	Adobe Acrobat D...	
 finance 2020 daily holiday listing.pdf	23/12/2019 13:04	Adobe Acrobat D...	
 gov & comms 2019 daily holiday listing....	23/12/2019 13:09	Adobe Acrobat D...	
 gov & comms 2020 daily holiday listing....	23/12/2019 13:10	Adobe Acrobat D...	
 housing - lee 2019 daily holiday listing.pdf	23/12/2019 13:00	Adobe Acrobat D...	
 housing - lee 2020 daily holiday listing.pdf	23/12/2019 13:01	Adobe Acrobat D...	
 housing 2019 daily holiday listing.pdf	23/12/2019 13:07	Adobe Acrobat D...	
 housing 2020 daily holiday listing.pdf	23/12/2019 13:08	Adobe Acrobat D...	
 housing Mgmt 2019 daily holiday listing....	23/12/2019 12:23	Adobe Acrobat D...	
 housing Mgmt 2020 daily holiday listing....	23/12/2019 12:25	Adobe Acrobat D...	
 hr 2019 daily holiday listing.pdf	23/12/2019 13:19	Adobe Acrobat D...	
 hr 2020 daily holiday listing.pdf	23/12/2019 13:20	Adobe Acrobat D...	
 ict 2019 daily holiday listing.pdf	23/12/2019 13:22	Adobe Acrobat D...	
 ict 2020 daily holiday listing.pdf	23/12/2019 13:23	Adobe Acrobat D...	
 maint 2019 daily holiday listing.pdf	23/12/2019 13:12	Adobe Acrobat D...	
 maint 2020 daily holiday listing.pdf	23/12/2019 13:13	Adobe Acrobat D...	
 mbh 2019 daily holiday listing.pdf	23/12/2019 13:25	Adobe Acrobat D...	
 mbh 2020 daily holiday listing.pdf	23/12/2019 13:26	Adobe Acrobat D...	
 ps 2019 daily holiday listing.pdf	23/12/2019 13:14	Adobe Acrobat D...	
 ps 2020 daily holiday listing.pdf	23/12/2019 13:16	Adobe Acrobat D...	
 ps management 2019 daily holiday listin...	23/12/2019 12:58	Adobe Acrobat D...	
 ps management 2020 daily holiday listin...	23/12/2019 12:59	Adobe Acrobat D...	
 supported housing 2019 daily holiday list...	23/12/2019 12:15	Adobe Acrobat D...	
 supported housing 2020 daily holiday list...	23/12/2019 12:18	Adobe Acrobat D...	
 wwwc&r 2019 daily holiday listing.pdf	23/12/2019 13:17	Adobe Acrobat D...	
 wwwc&r 2020 daily holiday listing.pdf	23/12/2019 13:18	Adobe Acrobat D...	

EV.24 Screenshot of storage location and password protection for confidential document.

The spreadsheet was stored in the required location and password protected for confidentiality, as demonstrated below.



From: Joanne Thomas
To: Victoria Evans
Subject: Breathe update
Date: 26 January 2020 17:51:00

Hi Tori

Further to your request for information about the Breathe implementation, please see below:

- The drop-in sessions were well-received, attendance was in small amounts however, many employees said they found the user guides easy to follow.
- 95% of employees have currently registered their account on Breathe. The reason for outstanding employees are maternity leave, long-term sickness and one field-base employee who is waiting for a digital device.
- We found during recent touch points with employees, that the majority of employees are actively using the system and are experiencing little difficulty.
- However, as expected, those with poor ICT competency are struggling more. We have offered further support by doing a 'how to' session during team meetings, one-to-one session or ad-hoc support as and when they need it. We have touched base with their line managers to ask them to monitor their usage on the system and to flag if they have continued concerns.
- Only 23% of employees have updated their personal details which is disappointing. However, line managers are going to remind their teams to complete this.
- I have reviewed log-in activity and the majority of employees are logging in regularly. The least log-in activity is from the field-based teams however, the activity is not alarming. I am attending a field-based team meeting to provide a Breathe demonstration and Q&A so I'm confident this will encourage these teams to access Breathe more regularly.
- Generally, the impact to employees has been minimal; the majority has taken very well to the system however, a conscious effort to support the small few who are struggling should be made.
- It was common amongst teams to comment that they found annual leave in hours confusing, especially as the daily hours are set-up differently to their actual daily working hours. I reassured teams to always get in touch with our team for help if they are confused. However, as discussed, our team will be assessing the effectiveness of the change to annual leave hours in 6-12 months.

Please let me know if you need any further information.

Many thanks

Jo
People Advisor

From: Joanne Thomas
To: All ateb Group Staff
Subject: Breathe outcome
Date: 29 January 2020 11:36:15
Importance: High

Dear all

Since my last e-mail on the 17th January, the People Team have reviewed Breathe so we thought we would share our insights.

Every active employee has registered on Breathe which is fantastic - thank you for getting onboard and being so enthusiastic. Many of you are using the system without difficulty which is great but don't forget, we have another drop-in session on the 31st January 2020 at 10am and 2pm in the Boardroom! Or drop-in to see us any time if you can't make the session and need some help.

Many of us are yet to update our personal details and emergency contacts on Breathe. It would be great if you could get this updated as soon as possible. The user guides are still on Yammer - you'll find a guide to tell you how to update your details.

We are currently looking at using Breathe for other functions such as document reading and training. We are looking at trialling these functions soon and as always, we will keep you updated with any news.

Don't forget that we're always here if you need any help - just give us a call, drop-in or invite us to a team briefing.

Many thanks

Jo
People Advisor

Development plan

NAME:	Joanne Thomas	MEMBERSHIP NUMBER:	53274130
COVERING THE PERIOD FROM:	January 2020	TO:	May 2020

This record sheet is for your guidance only – you may present your development plan in any other format.

Planned outcome

Where do I want to be by the end of this period? What do I want to be doing? (This may be evolutionary or “more of the same”).

What do I want/need to learn?	What will I do to achieve this?	What resources or support will I need?	What will my success criteria be?	Target dates for review and completion
Improve the Decisive Thinker behaviour whereby, I have the ability to analyse and understand data quickly. Use a range of information and insights to make recommendations and informed decisions.	Although I collate data in my role, I have less involvement in the data analysis. Therefore, I will request to shadow my manager during data analysis so I can understand the data better and also have an opportunity to ask questions. Review the measurements/ measurement tools we use now and consider if there are better options. Shadow a different department to understand what data they use and how they use it to support their service areas.	Read books or articles to widen my knowledge about information and insights. Support of my manager. Attend the quarterly service delivery group when the organisation's analysed data is presented, to widen my knowledge and understanding.	A better understand of what tools to use to gain information and insights. Making informed decisions based on the information analysed. A better understanding of the organisation's data collection.	May 2020
Improve competencies in the Organisational Development professional area to align with my role and level.	Shadow change lead during next change process. Assess my current level in organisational development	Read books and articles about effective change management.	A better understanding of creating change and awareness of how to manage it from a strategic level.	May 2020.

	professional area, using the CIPD profession map. Share the results with my manager to ascertain specific areas I should improve.	Support of wider teams to allow me to shadow or ask for advice and knowledge sharing. CIPD profession map.	Successful participation in another change management process. Improvement in areas identified with my manager.	
--	---	---	--	--