

Qualification: CIPD Diploma in Applied Human Resources

Module Name: Contributing to Employee Engagement
in the Workplace (5AEEG)

Word Count

LO1 – 1,015

LO2 – 752

LO3 - 871

Student Name: Lucy Moriarty

Student Number: 2014451

CIPD Membership Number: 5749316X

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: Lucy Moriarty

Date: 28.03.2022

Table of Contents

Topic	Page
Evidence Matrix	1 - 3
Learning Outcome 1 with evidence. Be able to assess levels of employee engagement within the organisation	4 - 40
Learning Outcome 2 with evidence. Be able to evaluate current organisational approaches to employee engagement	41 - 44
Learning Outcome 3 with evidence. Be able to recommend and plan strategies to raise levels of employment engagement within an organisation	45 - 61

Candidate name: Lucy Moriarty				CIPD Membership/registration No.: 5749316X		
Qualification title: CIPD Diploma in Applied Human Resources				Unique Learner No. (ULN):		
Unit Code	Unit title	Assessment criteria no.	Evidence description	Evidence reference number	Assessor initials	I/V initials if sampled
5AEEG	Contributing to Employee Engagement in the Workplace	1.1	Initial Review, Supervision and Annual Performance Review Policy	EV.1.1		
5AEEG	Contributing to Employee Engagement in the Workplace	1.1	Appraisal Form	EV.1.2		
5AEEG	Contributing to Employee Engagement in the Workplace	1.1	Supervision Forms	EV.1.3		
5AEEG	Contributing to Employee Engagement in the Workplace	1.1	Key Messages from Coffee with Paul	E.V.1.4		
5AEEG	Contributing to Employee Engagement in the Workplace	1.1	Exit Interview Form	E.V.1.5		

5AEEG	Contributing to Employee Engagement in the Workplace	1.2	Email to Head of HR	EV.1.6		
5AEEG	Contributing to Employee Engagement in the Workplace	1.2 & 1.3	New Exit Interview Form	EV.1.7		
5AEEG	Contributing to Employee Engagement in the Workplace	1.3	Leavers Letter	EV.1.8		
5AEEG	Contributing to Employee Engagement in the Workplace	1.4	Exit Interview Responses	EV.1.9		
5AEEG	Contributing to Employee Engagement in the Workplace	2.1	Investors in People Survey Responses	EV.2.1		
5AEEG	Contributing to Employee Engagement in the Workplace	3.2	Meeting with Line Manager RE: EAP	EV 3.1		
5AEEG	Contributing to Employee Engagement in the Workplace	3.2	Business Case: Employee Assistance Programme	EV 3.2		
5AEEG	Contributing to Employee Engagement in the Workplace	3.2 & 3.3	Meeting with Head of Learning & Development	EV 3.3		

5AEEG	Contributing to Employee Engagement in the Workplace	3.3	Month 2 Questionnaire	EV 3.4		
5AEEG	Contributing to Employee Engagement in the Workplace	3.3	Month 4 Questionnaire	EV 3.5		
5AEEG	Contributing to Employee Engagement in the Workplace	3.3	Month 6 Questionnaire	EV.3.6		

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:

Lucy Moriarty

Date:

Learning Outcome 1

(Armstrong, 2009) defines employee engagement as the heart of the working relationship, its described as being about what employees do and how they act in their jobs, and what motivates them to perform in ways that helps the organisation and themselves achieve their goals. Within my organisation, employee engagement tools are limited, and this has been identified more recently during the recent COVID-19 pandemic. As guided by the organisational 'Initial Review, Supervision and Annual Performance Review' policy (EV.1.1), line managers are expected to meet with their employees every 6-8 weeks in a 1:1 supervision meeting. Within these meetings employees are able to discuss their training and progression needs along with creating organic conversations around wellbeing, it also provides a chance for managers. Due to the pandemic the appraisal and supervision forms were reviewed and amended to provide a greater focus on employee wellbeing and create leading questions that would create organic conversations around well-being. (EV.1.2 & EV 1.3). One-on-one meetings are crucial since employee engagement is a personal matter. As a result, managers and direct supervisors have the most in-depth knowledge of the people they supervise. They are in the best position to determine what motivates individuals to engage. Employees who are engaged stay within their roles because of the advantages provided by their line managers which in effect evidences that they have been listened to.

As my organisation is within the health and social care sector, during the past 2 years there has been a higher than usual rate of turnover. The COVID-19 pandemic has put tremendous strain on health and social care workers, however, even prior to the COVID-19 outbreak, health and social care was understaffed and underfunded. Exit interviews are used within my organisation, in order to capture the reasons of why an employee resigns. Within my organisation employee engagement activities are led by the learning and development team. However, due to the recent pandemic and high rate of turnover within the past 2 years; exit interviews have been the most important and at times the only diagnostic tool used, in order to provide an understanding of how departing employees view the organisation. Feedback from employees that are leaving the organisation is most valuable as it will be the most honest feedback that will be received.

The Chief Executive Officer of the organisation holds an informal monthly meeting with different groups of employees, all from different departments (EV 1.4). The meetings are called "coffee with Paul" are held virtually and encourages employees to discuss what they feel is and isn't working within the organisation. The CEO then uses the feedback from the meeting to amend any issues or highlight the departments where there has been positive feedback received. The meetings with the CEO have been well regarded by employees and the consensus is that employees like the hands-on approach that the CEO has with the organisation, and they feel listened to and are able to witness the changes that are made from a top-down approach.

At present there is an ongoing project that is being undertaken by the Learning and Development team, where they are reviewing current organisational employee engagement diagnostic tools. Supervision and appraisal forms have recently been amended to include questions about employee's wellbeing. It was recently identified, due to the high rate of turnover, that the format of the exit interview forms that were in place were not fit for purpose (EV 1.5). The forms were long-winded and were previously being posted to employees to complete and return via post. During the pandemic the exit interview forms were then sent to the employee via email, making it the responsibility of the employee to complete and return. However, the return rate was low as employees did not have time to download and complete a long-winded form and did not want to either post or scan the forms back. Therefore, I arranged a meeting with Head of HR in regard to

reviewing and modifying the exit interview form and creating a digital copy to send to employees, enabling the form to be completed easily (EV 1.6). I created the exit interview on Microsoft forms and condensed the document and added multiple choice answers and a space for employees to elaborate on their answers (EV 1.7). Microsoft forms enables you to copy a link which accesses the form, in order for it to be forwarded electronically. The exit interview link that is sent from my organisation is included in the leavers letter and is forwarded from HR to the leaver once their resignation and leavers form is received (EV 1.8).

Within quarter 3 - October, November and December 2021, sickness absences and turnover were high, and this is when the new exit interview forms were introduced. The new form has proved to be successful in capturing the reasons of why staff members resign, by using the electronic form there was a 70 percent response rate. The results (EV 1.9) revealed that the majority of respondents had worked for the company for at least five years or more and were from different regions and departments. The reasons for leaving were concerning and highlighted the areas of employee engagement that were lacking and had been seriously affected within the past 2 years. There was a variety of reasons for employees leaving, however, the main reasons were due to employees feeling unhappy at work, lack of appreciation and recognition, feeling burnt out and poor relationships with management. However, the most common reason recorded was due to work-life balance caused by high pressure working and employees re-evaluating their lives in the wake of the pandemic. Positively, employees felt that they were properly equipped to carry out their roles and also felt that their team was the best part of their jobs, which could be attributable to support staff working so closely during the pandemic and because of the camaraderie that they shared. Going forward as an organisation, well-being practices will be developed and prioritised for all employees and managers, ensuring that they are able to talk about any challenges in a safe and trusting environment.

References

Armstrong, M., 2009. *Armstrong's handbook of human resource management practice*. 11th ed. London: Kogan Page, p.337.

Initial Review, Supervision and Annual Performance Review Policy

Initial Reviews, Supervision and Annual Performance Reviews are three of the key systems which Walsingham Support has established to ensure that all employees are well supported and clear about the organisation's requirements of them both in fulfilling their particular role and in supporting the work of the organisation.

Each of these support systems are a two-way process and will only be effective if both the employee and their line manager are open and honest.

SECTION 1

INITIAL REVIEW

During the first six months of employment all employees are on probation (also referred to as Initial Review (IR) period).

After the initial four months of continuous service, the new employee's line manager should consider whether there are any unsatisfactory aspects of their new employee's work, though these should have been identified during previous supervisions and a process put in place to try and correct them. If such areas are identified, these should be discussed in order that the new employee has the chance to address these areas in time for the IR meeting.

There may be some circumstances when an IR period is extended, but this should be for no longer than three months, unless there are exceptional circumstances and in such instances guidance should be sought from an appropriate member of the HR team.

It is the line manager's responsibility to ensure that the IR meeting takes place at or around six months of employment. The IR meeting is an opportunity to review performance to date, set new objectives and to identify any training and development needs. (Please also see Performance Based Annual Performance Reviews in Section 2.)

Once fully completed and signed by all parties, including 2nd line manager at senior manager level, the IR documentation must be sent to HR to be actioned as appropriate.

There may be occasions when permanent employment is not confirmed and employment is terminated during, or at the end of, the IR period or extended IR period. If non-confirmation of employment is a likely outcome, then the process for this should be as follows; first invite the employee to a meeting to discuss their performance. Secondly, hold the meeting, (having first discussed the possible outcomes with a senior manager/director/HR) give the employee an opportunity to state their case, break to consider your decision, consult as appropriate and then inform the employee of the decision verbally and also confirm the outcome in writing. HR must also be informed of the eventual outcome. Copies of all the relevant paperwork should be forwarded to HR.

Individuals cannot apply for transfers or promotions during their IR period unless they fully meet the criteria of both the job description and person specification of the advertised role.

Whilst an employee remains within their Initial Review (probationary) period normal disciplinary procedures do not apply.

SECTION 2

ANNUAL PERFORMANCE REVIEWS

All employees will have their own Annual Performance Review which is a 'live' document summarising all areas of their performance to date, personal development goals, personal development plan and maintenance of skills.

Annual Performance Reviews should be carried out in person, annually, for all staff. Annual Performance Reviews should be completed by the end of April for the Annual Performance Review cycle which runs from 1 April to 31 March.

The first full Annual Performance Review should take place at the next available organisational Annual Performance Review date after the completion of an individual's Initial Review (IR). If the IR has taken place in the preceding three months to 31 March, then an Annual Performance Review will *not* be required. Therefore, if a successful IR was due and completed after 31 December, the first full Annual Performance Review will not be due at the next organisational Annual Performance Review date, but in the following Annual Performance Review cycle year. IR objectives should be set in line with normal Annual Performance Review objectives as far as possible and take account of the timeframe between the IR and next full Annual Performance Review.

During the year, the supervision process should be used to ensure the continual monitoring of the progress of objectives. The Annual Performance Review should be completed using the organisational guidelines, which can be found on the intranet under Learning & Development Forms.

Employees who are on maternity leave or on any other extended authorised absence from work, should have their Annual Performance Review carried out before the start of this leave wherever possible. If this is not possible and it is unreasonable to contact the employee to participate in the process, then an assessment should be carried out in their absence based on their previous year's performance and be no less favourable. Annual Performance Review objectives should be discussed and agreed on the employee's return to work.

If an individual does not agree with their Annual Performance Review content, they can appeal to their 2nd line manager within 5 days of the Annual Performance Review meeting with the first line manager. Appeals must be in writing outlining the reasons for the appeal along with evidence to support it.

All Annual Performance Reviews are confidential and should be kept in a secure location. Apart from the appraisee and appraiser, the portfolio can only be accessed through the line management structure.

SECTION 3

SUPERVISION

Walsingham Support has adopted the following definition for supervision:

"Supervision is a process in which one employee is given responsibility to work with another employee in order to achieve certain professional, personal and organisational objectives. These objectives include competent, accountable practice, continuing professional development and personal support." Walsingham Support sees the prime purposes of Supervision and Support as being:

- Maintaining the organisations **values and behaviours**
- Maintaining and developing the quality of practice;
- Professional development;
- Role clarity;
- Organisational objectives;
- Promoting a suitable climate for practice;
- Stress reduction;
- Communication;
- Resources.

There are four functions of Supervision and Support. These are:

- Managerial: primarily concerned with the overall performance of the employee and ensuring that this is in line with the organisation's expectations and standards.
- Education: concerned with enabling employees to assess their own level of skill and competence, and to develop these as appropriate.
- Supportive: about the personal aspect of the supervision process where the safe trusting relationship shared between the supervisor and employee enables the employee to identify and deal with the personal impact of their work.
- Mediation: concerned with the establishment of healthy feedback mechanisms from the line manager to the individual, and equally importantly, from the individual to the organisation.

Supervision can be conducted in many different formats. The usual format should be a face to face meeting between the manager and their supervisee but other methods such as group supervision, supervision via telephone, mentoring sessions etc. can also be effectively utilised.

Under this policy, all employees should have a supervision session at least every 6 – 8 weeks, or in accordance with local Regulation (or Contract if different from these timescales), with a minimum of 6 one-to-one supervision meetings each year. Supervision should allow enough time to discuss matters properly but should not be longer than a maximum of two hours and the time should be uninterrupted. Supervisory staff should also undertake observed practice of staff on a regular basis as part of the overall supervision process.

Notes of each supervision must be taken and who completes these will be decided by the supervisor following discussions in the first supervision. Both supervisor and supervisee will retain a copy of finalised notes. Both parties should sign supervision notes unless it is stated otherwise in the Supervision Agreement between supervisor and supervisee. The notes should be available within 48 hours of the session – and may be hand-written, and can be further accessed through the line management structure.

Before commencing supervision, the second line manager must ensure that the supervisor is appropriately skilled in all aspects of supervision. Supervisors must complete relevant on the job training or attend a Walsingham Support approved course, prior to commencing supervision if not sufficiently skilled.

If an employee's supervisor changes, previous supervision notes should be forwarded to the new line manager. Supervision and the supervision notes contribute to both the initial review and Annual Performance Review processes and this should be borne in mind when planning the agendas for supervision. If the supervisee is dissatisfied with any aspects of their supervision, or lack of it, and the areas of concern cannot be resolved by the supervisor, the second line manager should be contacted in order to try and resolve the areas of concern.

Further clarification on matters concerning supervision can be sought from HR.

EV 1.2 Appraisal Guidance 2021 (revised document due to Covid-19)

In acknowledgment of recent events due to Covid-19 the appraisal form has been changed to provide a greater initial focus on well-being over the last few months using the Five Ways to Well-being framework. At Walsingham Support we recognise that well-being, particularly during these times is key, and want to provide a space for supportive conversations.

The purpose of an appraisal is to provide a template for conversation, reflecting on the period since the last appraisal or start date. It is an opportunity for the appraiser and appraisee to celebrate and recognise achievements that have been made and acknowledge any challenges faced. This conversation should help to inform goals and learning objectives to be agreed for the next period that will build on existing strengths and enhance performance.

Below is a guide to the appraisal process with some prompting questions to support reflection when completing the form. You may also find that referring to the competencies for your role, your team objectives, and the values of the organisation helpful.

Step 1 – Thinking back

- What have you achieved? What challenges were there? What have you learned?
- Which behaviours would you consider strengths, and which are areas could you work on?
- Speak to peers if you need help finding specific examples.

Step 2 – Looking forward

- What do you need to do to get even better at your job?
- Think about the goals you want to achieve next year – what is important to you and will make a difference?
- What skills and knowledge are you going to need in the next period? Are the demands of the job changing? Are there different ways of doing things that require new skills?

Step 3 – Give your manager a copy of the Self Review

- Send a copy of the completed appraisal to your manager at least 1 week before your scheduled meeting.
- Your manager will then reflect on your responses and examples preparing some of their own observations to share with you.

Step 4 – Appraisal meeting with your manager

- During the meeting there will be a joint discussion/ reflection on the period since your last appraisal or start date noting achievements and challenges.
- Looking ahead with your manager you will discuss and agree goals or objectives for the coming year to help you achieve the team and organisational goals.

- Together you will explore your needs to agree a learning, training and development plan that identifies the skill and knowledge areas to build on.
- The appraisal should be signed by you and your manager and you will be given a copy.

Step 6 – Supervision and review

- Your goals and the accompanying learning, training and development objectives should be kept under review throughout the year to review progress and check that goals are still relevant.

Appraisal 2022

Staff Name:		Service/Department:	
Line Manager:		Date:	
Wellbeing – let's talk about how you are doing under the 5 ways to wellbeing.			
1. How are you connecting with others at the moment; what's working and well or not so well?			
2. How are you keeping active at home and work?			
3. With all that is going on how are you remaining aware of what's around you and how you are managing that?			
4. What are you doing to engage with learning at home and or work?			
5. How are you interacting/ giving to others at home and or work?			
Overall how would you describe your wellbeing now and throughout the recent months; is there anything you need support with?			

Review of 2020/21 – let's talk about how the last year has been.	
1. What has gone well for you in 2020/21? (review objectives/provide specific examples)	
1.1	
1.2	
1.3	
1.4	

2. What could have gone better? Why and how would you have done it differently?	
2.1	
2.2	
2.3	
2.4	

Let's check in on as business as usual.

How are things going in general, are there any hotspots we need to talk about? What's going well and what is stopping you achieving things?

Looking ahead – what objectives will help you to achieve the team and organisational goals in 2021/22.

We need a minimum of three objectives – at least one that is personal to you and two that will support the organisation to achieve its overall objectives. Let's think SMART and describe objectives in that way.

Corporate Objectives.

The following objectives have been agreed for us all across the organisation. At different levels we can all make a different contribution to these. As part of ongoing supervision, we will discuss how you can and do contribute to the success of these objectives and then we will review them.

- | | |
|---|---|
| 1 | To be responsible for my own understanding and actions that safeguard the wellbeing of individuals we support and through my work, to support and promote safe environments that enable individuals to be happy and to reach their full potential. |
| 2 | To be responsible for the management of the finances associated with my service/team/department through monitoring and appropriate use of resources available (people, money, equipment) to deliver an efficient and effective service within agreed budgets. |

Personal Objectives.

The following objectives(s) should be specific to the role you undertake for Walsingham Support and should demonstrate the contribution you plan to make over the coming appraisal period.

- | | |
|---|--|
| 3 | |
| 4 | |

In order to achieve your objectives and perform in your role what learning, training and development needs do we need to support you with?

This is not just about attending courses but learning from others, gaining experience and developing your knowledge – we can do this in many different ways.

- | | |
|---|--|
| 1 | |
| 2 | |
| 3 | |

EV 1.3

Staff Supervision Form

Staff Name:		Service/Department:	
Line Manager:		Date:	

Personal wellbeing and work/life balance How are you? What's the workflow like? How can I support you?
Strategic priorities: Have you been provided with a copy of the Walsingham Strategic Plan? Do you understand how your objectives fit into the overall plan? Do you understand your role within your team plan?
Highlights of current work priorities
What has gone well and how did you achieve it? Let's find out, learn from and build on recent successes
What has been challenging and what are the lessons learnt? If we have learning conversations together, we can empower ourselves, get unstuck and grow
Your team General welfare. How are you supporting each other?
Annual Leave/Sickness
Any matters arising from previous supervision

--

Corporate Objectives.

The following objectives have been agreed for us all across the organisation. At different levels we can all make a different contribution to these. As part of ongoing supervision, we will discuss how you can and do contribute to the success of these objectives.

1	To be responsible for my own understanding and actions that safeguard the wellbeing of individuals we support and through my work, to support and promote safe environments that enable individuals to be happy and to reach their full potential.
2	To be responsible for the management of the finances associated with my service/team/department through monitoring and appropriate use of resources available (people, money, equipment) to deliver an efficient and effective service within agreed budgets.

Action No.	Agreed actions	Who	Date to be completed	Done
1				
2				
3				
4,				
5				
8				

Supervisor reflections of the meeting

--

Supervisee reflections of the meeting

I confirm that I have read, understood and agree with the contents of this form.			
Staff name:		Line Manager Name:	
Signed:		Signed:	
Date:		Date:	

EV 1.4

Coffee with Paul

Key Messages – March 2022



Hi All,

This session was a reunion of our first group who attended “Coffee with Paul” in March 2021 to discuss progress on key actions. We were able to recognise that progress had been made in many areas with the group feeding back that they were pleased to see.

- **Staying Connected**
 - We continue to create opportunities within team meetings for staff members from various other departments to join and contribute.
 - ELT & Trustees remain committed to staying connected with local services through regular catch ups.
 - We are consulting with the Involvement Forums to see how we can best connect staff with individuals we support during 2022/23.
- **Communication & Culture**
 - We are planning to launch a “Live with Liz” session inviting colleagues from across the organisation to focus on culture, including the ways we communicate, over the coming year - if you are interested in joining to support us with this work we would welcome the opportunity to continue our conversations with you.
- **Person Centred Documentation**
 - The O&D and L&D teams will work together to ensure that care planning and other documentation is effective across the organisation.

EXIT INTERVIEW

Walsingham invests considerably in its employees and its efforts to maintain a stable workforce, therefore, an understanding of why an employee decides to leave can be of benefit to the organisation as it continues to grow and develop.

We ask that you are open, honest and constructive in your comments. In return, we promise to treat your comments with confidentiality within the relevant senior management and HR functions. We also promise that our replies to any reference request for you will not be influenced by the frankness and honesty of your comments.

All exit interviews are kept separately; they are not entered on the computer nor filed on your personnel file.

NAME:

POSITION:

WORK LOCATION:

START DATE OF EMPLOYMENT: LEAVE DATE:

1. What was the best part of your job?

WHY?:

2. What did you like least about your job?

WHY?:

3. Your line manager's name: _____

<i>DID YOUR LINE MANAGER?</i>	<i>Always</i>	<i>Usually</i>	<i>Seldom</i>	<i>Never</i>
Know and follow procedures				
Explain your duties & responsibilities clearly				
Give you feedback on your performance				
Hold supervision regularly (at least monthly)				
Deal promptly with complaints & problems				
Listen to suggestions or criticism				
Show fair treatment				
Gain your respect through their judgement				
Allow you access to them in an approachable manner				

Additional comments:

4. Working relationships & morale within the staff team were: Please tick relevant boxes in both columns.

<i>Relationships</i>		<i>Morale</i>
	Very Good	
	Good	
	Satisfactory	
	Poor	
	Difficult	

Additional comments:

5. Staff rotas were: Please tick where appropriate.

Available at least 2 weeks in advance	
Flexible to accommodate personal needs	
Provided adequate rest periods in between shifts	
Gave at least one weekend a month off to each employee	
Provided adequate cover within the home / dept	

Additional comments:

Please tick the boxes that best reflect your views & experiences:

6. Training & Development:

My induction training took place too soon after starting	
My induction training took place too late after starting	
My induction training was timed right	
All my training needs were met	
Some of my training needs were met	
None of my training needs were met	
Training received was Very Good	
Training received was Good	
Training received was Average	
Training received was Poor	

Additional comments:

7. General:

Health & Safety at work was good	
Health & Safety at work was satisfactory	
Health & Safety at work was poor	
My workload was manageable / reasonable	
My workload was too heavy / demanding	
My workload was too light / I didn't have enough work	
I had an opportunity to develop myself and my skills	
I did not have an opportunity to develop myself or my skills	
The job was clearly explained to me when I started	
The job was NOT clearly explained to me when I started	
My job description is very accurate	
My job description is fairly accurate	
My job description is NOT accurate	
Walsingham pay and benefits are good	
Walsingham pay and benefits are average	
Walsingham pay and benefits are poor	
I felt communication within Walsingham was Good	
I felt communication within Walsingham was Average	
I felt communication within Walsingham was Poor	
I felt that my contribution was valued by my line manager/Walsingham	
I did not feel that my contribution was valued by my line manager/Walsingham	

Additional comments:

8. **Would you recommend Walsingham as an employer?** YES / NO (Please delete as appropriate)

WHY?:

9. **Why are you leaving Walsingham?** If there is more than one reason for you leaving Walsingham, please rank these in order of importance – 1st being the most influential reason for you leaving.

Reason for leaving:

✓

Additional information on reason for leaving:

To return to study		What will you study?
Other employment – career change		Who is your new employer? Job / Career?
Other employment – promotion		Who is your new employer? Post?
Other employment – higher salary		Who is your new employer?
Other employment – no shift work		Who is your new employer?
Other employment – more hours		Who is your new employer?
Other employment – less hours		Who is your new employer?
Other employment – other reason		Who is your new employer? Reason?
Moving away from the area		Where?
Retirement		
Health reasons		
To travel		
Domestic/personal reasons		
Will not be working		
Dissatisfaction with Walsingham		Why?
Dissatisfaction with the job		Why?
Some other reason		What?

10. Have you got any other comments you would like to make?

Signature: _____

Date:

Name: _____

LEAVERS WITH LESS THAN ONE YEAR'S SERVICE:

11. Was your job what you expected it to be? YES / NO If NO – why not?:

12. Did you receive adequate support from your line manager? YES / NO

If NO – how could she/he have better supported you?:

13. What did you feel about the induction process? E.g. was it adequate, did it spread over a period of time that was too long/too short/just right, did it cover all necessary aspects, if not what was missing, etc.

How could it have been better?

14. A) How soon after starting your job did you do sleep-in duties (if part of the job role)? E.g. was it too soon/just right? How supported/prepared were you for them?

B)) How soon after starting your job did you work a shift without a 'mentor'? E.g. was it too soon/just right? How supported/prepared were you for this?

15. Did you administer medication? YES / NO

If YES, did you receive training on this before you administered medication? YES / NO

If YES, was it adequate? YES / NO If NO, what would have made it better?

16. What was the most difficult aspect of the job for you to adjust to?:

How could this have been avoided?:

17. What training or support would have best enabled you to adjust to your job?:

18. Did you receive any training? YES / NO

If YES, was it timed right? YES / NO If NO, was it too EARLY / too LATE?

19. Any other comments or observations:

Signature: _____

Date:

Name: _____

If completed in an exit interview this form should also be signed by the interviewer.

Signature: _____

Date:

Name: _____

Thank you for your comments.

EV 1.6

From: Lucy Moriarty <lucy.moriarty@walsingham.com>
Sent: 10 September 2021 11.32am
To: [REDACTED] <[REDACTED]@walsingham.com>
Subject: Exit Interview Form

|
Hi Vicky,

Following on from our meeting in regards to digitalising and condensing the exit interview form, please find attached the link to the form that I have created on Microsoft Forms.

<https://forms.office.com/r/D6vcxdY81U>

Please let me know if you require me to add any further information.

Cofion Cynnes/Kind Regards,

Lucy Moriarty
Cynorthwydd AD/ HR Assistant

Ffôn/Tel: 01792 312980 (Ext: 521)
Cyfeiriad/Address : Forge Fach Resource Centre, Hebron Road, Clydach, Swansea. SA6 5EJ

EV 1.7

1. Please state your name? (Please note this is optional)

Enter your answer

2. What region do you work in? *

- ☐ Head Office
- ☐ WSCS
- ☐ North
- ☐ Wales
- ☐ Central
- ☐ South

3. What service do you work in? *

Enter your answer

4. Which department do you work in? *

- ☐ Corporate Services
- ☐ Operations & Development

5. How long have you been employed at Walsingham Support? *

- ☐ Less than 6 months
- ☐ 6 months - 1 year
- ☐ 1 - 2 years
- ☐ 2 - 3 years
- ☐ 3 - 4 years
- ☐ 4 - 5 years
- ☐ 5+ years

6. Why did you begin looking for a new job & What is your reason for leaving? (please select all that apply) *

- ☐ Restructuring of the team
- ☐ Redundancy
- ☐ Retirement
- ☐ Fancied a change in sector
- ☐ No development opportunities
- ☐ Work-life balance
- ☐ Relationship with management
- ☐ Unhappy at work
- ☐ Feeling burnt out
- ☐ Lack of appreciation and recognition
- ☐ Culture of organisation/Hierarchical culture
- ☐ Salary
- ☐ Other

7. During your time at Walsingham how would you describe the following areas? *

	Very Poor	Poor	Unsure	Very Good	Excellent
Work-life balance	☐	☐	☐	☐	☐
Work culture	☐	☐	☐	☐	☐
Progression	☐	☐	☐	☐	☐
Appreciation	☐	☐	☐	☐	☐
Loyalty	☐	☐	☐	☐	☐

8. Did you feel that you were equipped to do your job well? *

- ☐ Yes
- ☐ No
- ☐ More training/support was needed

9. With respect to company culture, would you agree or disagree with the below statements? *

	Strongly Agree	Agree	Neither	Disagree	Strongly Disagree
Structured	☐	☐	☐	☐	☐
Flexible	☐	☐	☐	☐	☐
Hierarchical	☐	☐	☐	☐	☐
Professional	☐	☐	☐	☐	☐
Individually Focused	☐	☐	☐	☐	☐
Team Focused	☐	☐	☐	☐	☐
Open Minded	☐	☐	☐	☐	☐
Poor Communication	☐	☐	☐	☐	☐

10. What did you like best about your job? *

☐ Team

☐ Workload

☐ Employee Manager Relationship

☐ Support/training provided

☐ Weekly Check-in/Catch ups

☐

11. What did you like least about your job? *

- ☐ Team
- ☐ Workload
- ☐ Employee Manager Relationship
- ☐ Support/training provided
- ☐ Weekly Check-in/Catch ups
- ☐ Other

12. What could have been done for you to remain employed here? *

- ☐ More Training and Support
- ☐ Change in Management
- ☐ Change in Salary
- ☐ Change in Duties
- ☐ Other

13. If you could change anything about your job or the company, what would you change? *

14. On a scale of 1 - 10 how would you rate Walsingham Support as an employer? *

- 1 2 3 4 5 6 7 8 9 10
- ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

15. Any additional comments? *

Private and Confidential

[REDACTED]

[REDACTED]@gmail.com

08 March 2022

Dear [REDACTED]

I would like to advise you that your date of **31 January 2022** has been accepted and I can confirm your leaving details as follows.

- You will be paid up to and including **31 January 2022**. All contractual benefits will cease from this leave date.

Your final payslip and P45 will be sent to your personal email at the end of your final working month.

Where applicable, any outstanding mileage and expense claims must be submitted as soon as possible before your leave date to ensure payment can be made to you.

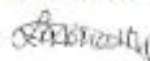
As part of the leavers process, please see below a link to complete an Exit Interview via an online survey, <https://forms.office.com/r/D6wxd781U>. The feedback you provide enables us to understand why colleagues leave the company, monitor trends, and make improvements.

Whether or not you choose to complete the Exit Interview or participate in an Exit Interview, your feedback will not affect any future references or employment prospects.

If you have any questions or queries on the above, please contact the HR by email HRMailbox@walsingham.com.

On behalf of the company, I wish you the best for your future endeavours.

Yours sincerely

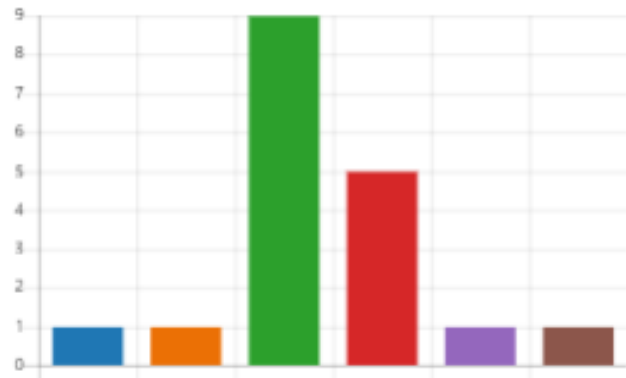
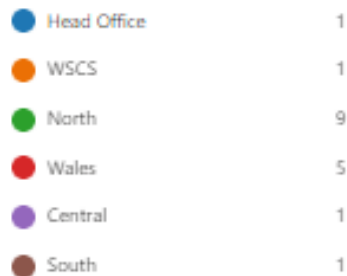


Lucy Moriarty
HR Assistant

EV 1.9

2. What region do you work in?

[More Details](#)



3. What service do you work in?

[More Details](#)

[Insights](#)

17

Responses

Latest Responses

"Head Office based"

"Whitehaven"

"Supported living north east"

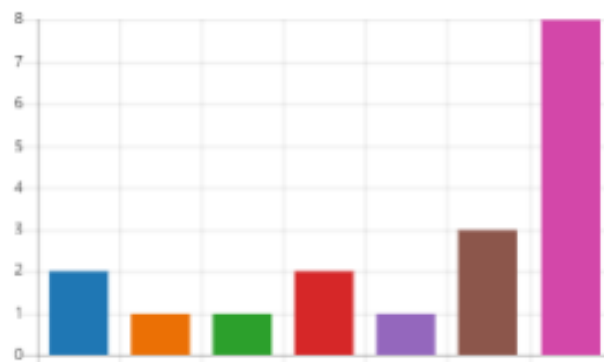
4. Which department do you work in?

[More Details](#)



5. How long have you been employed at Walsingham Support?

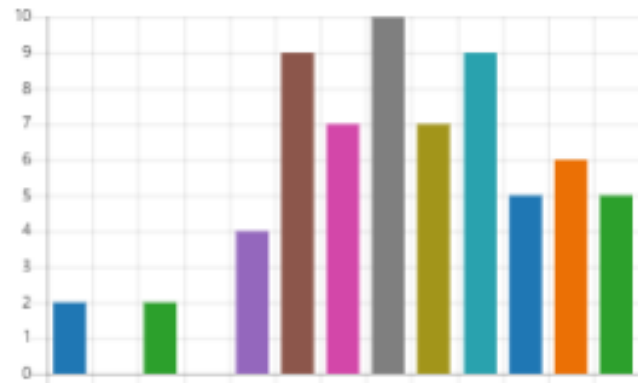
[More Details](#)



6. Why did you begin looking for a new job & What is your reason for leaving? (please select all that apply)

[More Details](#)

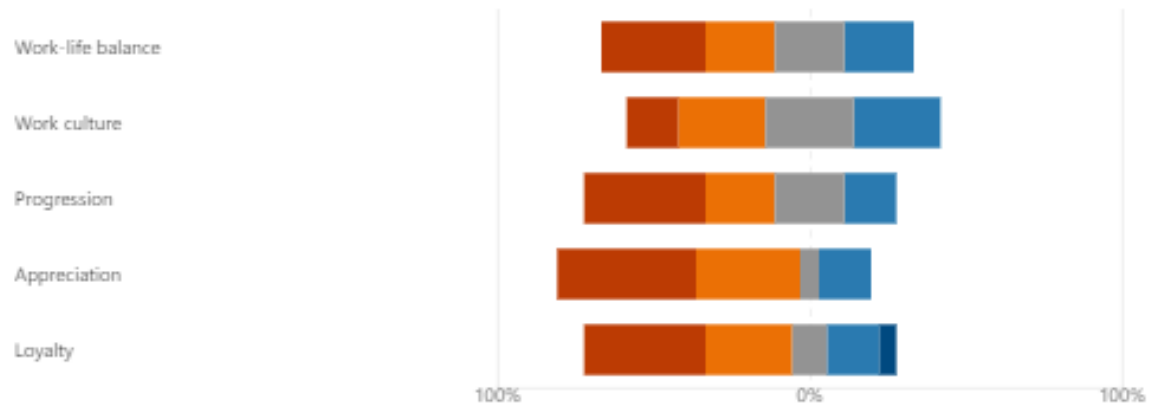
● Restructuring of the team	2
● Redundancy	0
● Retirement	2
● Fancied a change in sector	0
● No development opportunities	4
● Work-life balance	9
● Relationship with management	7
● Unhappy at work	10
● Feeling burnt out	7
● Lack of appreciation and reco...	9
● Culture of organisation/Hierar...	5
● Salary	6
● Other	5



7. During your time at Walsingham how would you describe the following areas?

[More Details](#)

Very Poor Poor Unsure Very Good Excellent



8. Did you feel that you were equipped to do your job well?

[More Details](#)

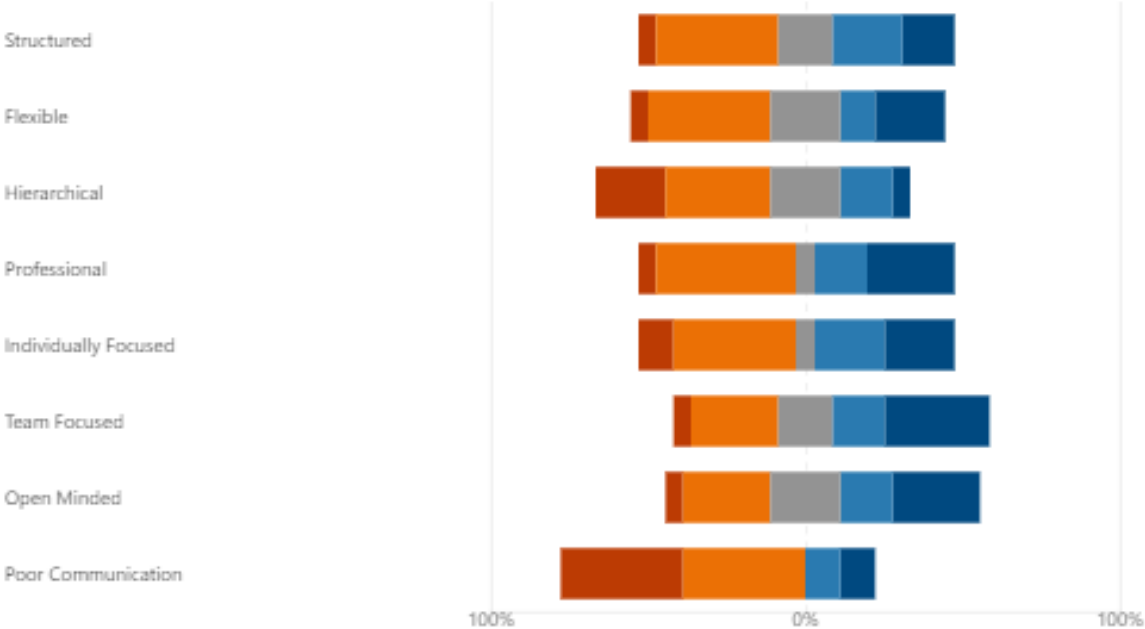
Yes 13
No 0
More training/support was ne... 5



9. With respect to company culture, would you agree or disagree with the below statements?

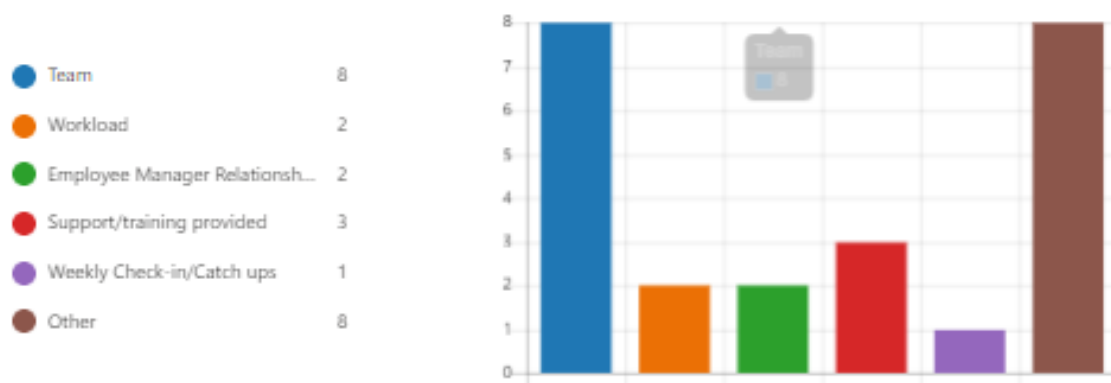
[More Details](#)

Strongly Agree Agree Neither Disagree Strongly Disagree



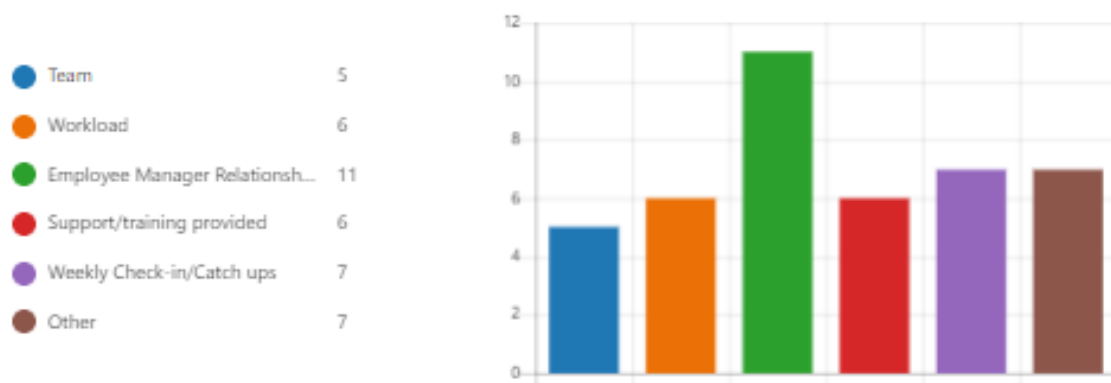
10. What did you like best about your job?

[More Details](#)



11. What did you like least about your job?

[More Details](#)



12. What could have been done for you to remain employed here?

[More Details](#)



13. If you could change anything about your job or the company, what would you change?

[More Details](#)

[Insights](#)

18

Responses

Latest Responses

"For someone to look at the hours given to the benefits team & truly s...

"More appreciation for the staff when working hard and around the cl...

"If I could change anything about the company is that managers treat...

Learning Outcome 2

According to (Gallup, nd.) surveys play an important part in gauging employee satisfaction and what drives it, however, it is not as easy as requesting that employees complete a survey. What really drives engagement according to Gallup is employees being acknowledged for their abilities. My organisation is regularly assessed and accredited by Investors in People UK. The Investors in People framework was created to assist organisations in improving performance and achieving organisational goals by focusing on people management and development. The data identified through the Investors in People assessments creates learning and development opportunities for the organisation and enables them to identify where improvements need to be made and what the key drivers for employee engagement are. In June 2019, my organisation achieved the Investors in People silver status accreditation, it was the organisation's ninth award since 1996. The accreditation was achieved through a combination of online assessments, observations and interviews with employees. The assessment looked at 9 indicators across 3 themes of leading, supporting and improving (EV 2.1). The assessments and interviews identified that the majority of employees felt that they along with management act in line with the organisation's values. Many felt that they know what is expected of them and that the work is effectively structured and designed, with clear decision-making opportunities, employees feel that they are encouraged to make decisions in relation to their own work and those that affect the organisation. When employees feel a part of the decision-making process it builds a trusting relationship and enables them to feel a valued member of the organisation.

Employee feedback is a highly effective tool, it has the potential to build and develop the people within the organisation, it improves levels of trust and communication, and strengthens ties between employees and management, if delivered appropriately. The Investors in People survey identified that 68.6% of employees felt that they receive regular and consistent feedback in regard to their performance, which enables employees to have a clearer understanding of what is expected of them. Employees also feel that the organisation is committed to delivering continuous Improvement. However, it was discovered that only a small number of employees felt that they were appreciated at work and were recognised for the effort and work that they carry out. Two years post pandemic, and this is still an ongoing theme, however, morale is at an all-time low and as evidenced by recent exit interviews undertaken by former employees, especially those that worked within a supporting role, they felt that they were not being recognised and did not feel valued for their work. Support staff felt that they had no choice but to continue to work in uncertain environments unsure of how it would affect their health in the long-term and with the introduction of mandatory vaccinations, employee's contracts were being terminated if they had not been vaccinated by a certain date. Although, this mandate was introduced by the government, it was being executed by the organisation and so made employee engagement dip further. Some employees saw their contracts being terminated by refusing to have the Covid-19 vaccine.

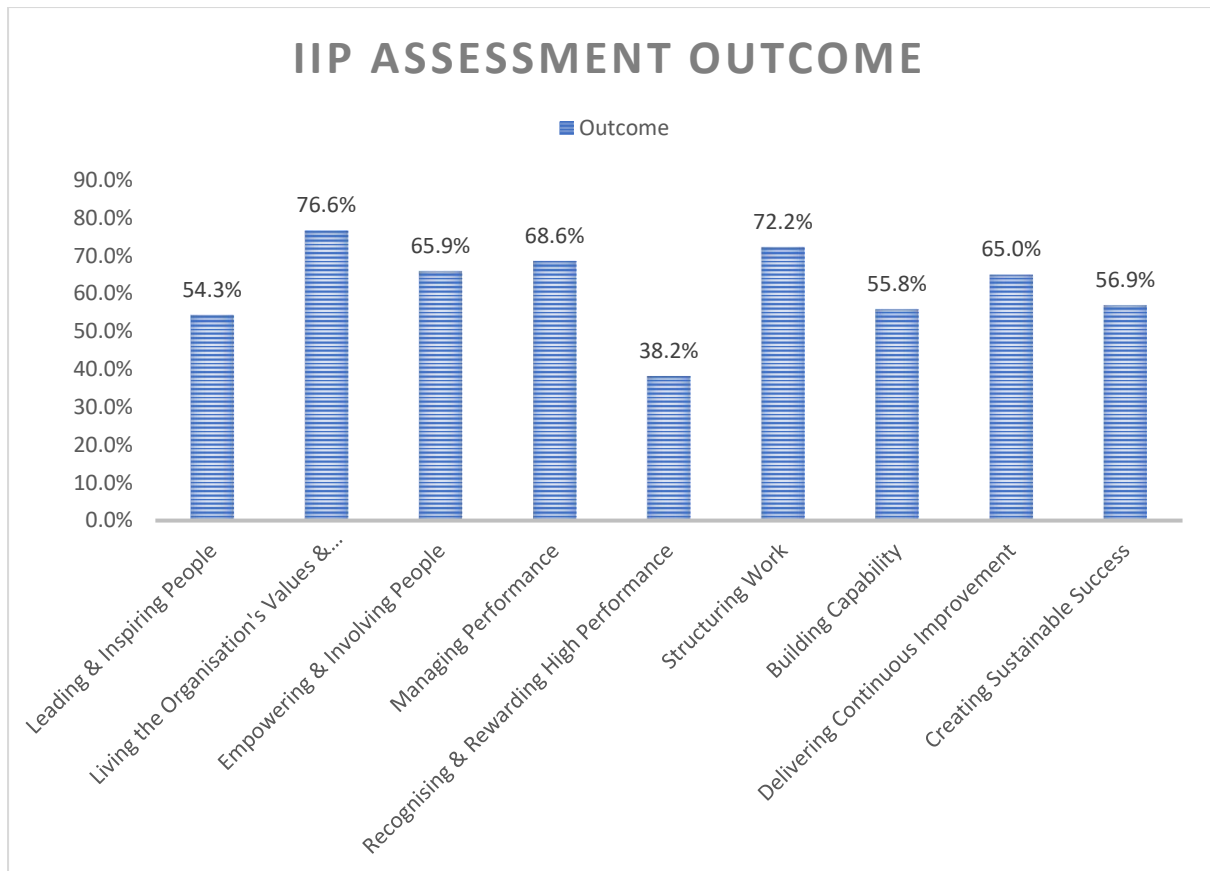
Employee absences impede and have a significant impact on employee engagement. Absence rates have been at an all-time high within the last two years and have affected the staffing levels in services within the organisation. Whilst the majority of absences have been due to Covid and self-isolation, there has been an increase of sickness absences relating to anxiety and depression, as a result of high pressure working. Employees with health conditions were placed on the government furlough scheme at the start of the pandemic, and when they returned, tensions were high between those who had worked through the crisis and those who had been self-isolating. As evidenced through current exit interview forms, work-life balance has had a significant impact on employee engagement. A poor work-life balance is a cause of poor engagement levels and is and has been

more of an issue for remote workers. While ensuring people manage their work lives in a healthy manner has always been difficult, it is significantly more difficult for remote workers. It has been identified that employees who have been remote working have found it difficult to 'switch-off' and have been known to work above their contracted hours. Employee engagement is one of the organisations key priorities but, however, there is no current employee engagement strategy in place. Currently, exit interviews are providing insight into the feelings of employees, however, at this stage it is too late.

References

Gallup.com. n.d. *How to Improve Employee Engagement in the Workplace*. [online] Available at: <<https://www.gallup.com/workplace/285674/improve-employee-engagement-workplace.aspx#ite-357473>> [Accessed 10 March 2022].

E.V 2.1



Learning Outcome 3

Within the IES report of Employee Engagement a review of current thinking identified that it is impossible and unsuitable to have a 'one size fits all' approach to employee engagement as its practices vary between employees, the work and the organisation as a whole. However, a study of 50,000 employees conducted by the Corporate Leadership Council in 2004 found that 22 of the top 25 factors of employee engagement are related to management. This is echoed by research carried out by (Kular et. al. 2008) who states that a management structure that provides skills, knowledge, incentive, and flexibility to their employees, results in a workforce that is a source of competitive advantage and encourages engagement. Line managers play a critical role in increasing employee engagement across departments. HR professionals employ a variety of strategies to engage managers in the process of cultivating an engaged workforce. Another identified employee engagement strategy is that of providing flexibility to employees. As identified through exit interviews undertaken within quarter 3, the main reasons that employees have provided for leaving is due to poor work/life balance, which has had an adverse effect on employee's well-being providing them with no other alternative but to resign from their roles.

As aforementioned, employee engagement strategies within my organisation have been substandard, especially within the past 2 years. Virtual meetings have taken place instead of face to face as a result of COVID-19 restrictions, which in turn has caused a feeling of a divide between support staff and their managers. By introducing new employee engagement strategies could see barriers such as lack of clarity around engagement practices, as they have not been shared widely within the organisation for a period of time. Recently postcards were sent to all staff within my organisation to thank them for their hard work throughout the pandemic, unfortunately, this way of providing an intrinsic reward was not well received by employees, as they felt that the money spent on the postcards could have been put to better use and so had the opposite effect of what it was intended.

Due to work/life balance and employee well-being being highlighted as the main reasons for employee resignations and also because of high absence rates that the organisation has been experiencing, I met with my line manager to discuss introducing an Employee Assistance Programme (EV 3.1) and to devise a business case to put forward to the Executive Leadership Team. Employee assistance programmes (EAPs) give third-party counselling services to help employees deal with difficult situations and provide support in areas such as mental health, relationships, and finances. Employee assistance programmes have been shown to increase employee productivity, satisfaction, and well-being. However, one of the challenges that may be encountered while establishing this programme is that people may not understand how to access the services and may be scared to do so since they do not fully comprehend the charges that they may incur. Employees may also be hesitant to participate in the programme due to the stigma associated with mental health issues, as well as a reluctance to confess that they are having difficulties. Managers are often not equipped to deal with some complex cases and so an EAP would be beneficial and will help with employee engagement strategies. All barriers were discussed and taken into consideration when completing the business case (EV 3.2).

Along with the introduction of an employee assistance programme my line manager and I recently met with the Head of Learning and Development (EV 3.3) to discuss introducing meetings between new staff members and a member of the HR team, during their 6-month probation period. During the first 6 months of an employee's lifecycle, they complete an induction programme and meet with their line managers once or twice in a formal capacity. It was discussed that a member of the HR

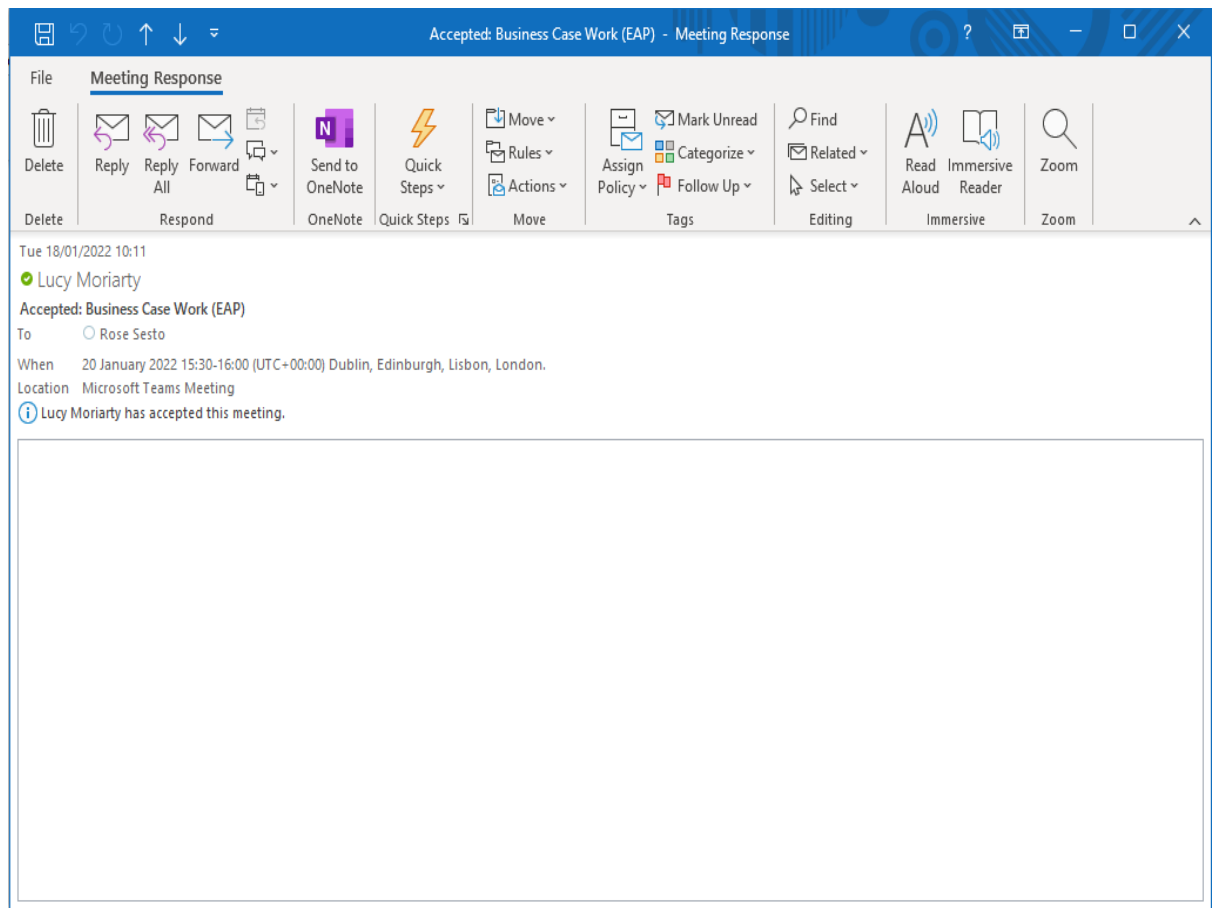
team would meet with the new starter on a bi-monthly basis to discuss their progress and any issues that they may have. Questions were devised for meetings to take place on month's two, four and six. During the employees second month of employment questions would identify whether the employee had been inducted properly into their role, determining whether they understand what is expected of them. It also asks for the employees' feedback and opinions on the organisations onboarding process, to ascertain if there needs to be any changes made (EV 3.4). Within the second meeting on month four, the questions provide a more in-depth analysis of how the employee feels in regard to work/life balance and how they feel that their role contributes towards the wider organisation (EV 3.5). The final meeting, which will take place in the employees six month of employment and prior to their initial review meeting, asks the employees about training that they have received so far, whether they have faced any uncomfortable situations or conflicts and whether they feel that their suggestions or feedback is valued or listened to (EV 3.6). Not only will this allow the employee to develop a relationship with HR, but it will also ensure that the employee is engaged from the outset, allowing HR to be the mediator between the employee and manager if any problems do arise and to aide and advise the manager on any development or training that the employee may need.

References

Robertson-Smith, G. and Markwick, C., 2009. *Employee Engagement - A Review of Current Thinking*. [online] Employment-studies.co.uk. Available at: <<https://www.employment-studies.co.uk/system/files/resources/files/469.pdf>> [Accessed 15 March 2022].

Eprints.kingston.ac.uk. 2008. *Employee Engagement: A Literature Review*. [online] Available at: <<https://eprints.kingston.ac.uk/id/eprint/4192/1/19wempen.pdf>> [Accessed 19 March 2022].

EV 3.1



EV 3.2

HR Business Case – EAP

Walsingham Support currently have around 961 employees and have been looking into ensuring they are supporting all employees' personal mental wellbeing. With the nature of the business, particularly those out there on the front line, we need to make sure we are supporting each employee as they provide care day in and day out, and we want them to feel valued and supported.

As Walsingham Support are a not-for-profit charity organisation, we understand that budgeting and training will be a key area of concern, along with the organisation wanting to reduce problems within the business.

Budgeting

On average, an EAP can cost anywhere between £6-£8 per employee, per year. If you base the budget on £8 per employee per year, as we currently have 961 employees, this will cost around £7,688 per year.

Employee wellbeing is something that you cannot really put a price on, however, as we have limited budgeting within the organisation, if it not currently fitting within the budget to afford this, we propose that we eliminate the Legal Advice side of XpertHR as we do already have Brabners Legal Team on hand. The rough costing for the Legal Advice side of XpertHR is around £7000 per year, therefore, almost the budget for placing an EAP at Walsingham Support. However, there is also the option of weighing up whether the cost for Brabners is higher than XpertHR and what the differences between these two services is and which Legal aspect will be most beneficial for Walsingham Support.

Skills

Managers are not equipped to help with specific complex mental wellbeing needs. One incident relates to an employee who feels suicidal and wishes to end their life, looking for something at the service to end their life. They need specialist support and Walsingham Support, at this moment in time, are not able to supply this. This is where an EAP will be beneficial as employees will be able to call up and speak to a credited councillor to support them with their complex needs.

Most EAP services also provide a 'Manager Hub Support' where if a manager notices an employee is in distress and are unsure how to handle the situation, they can call the advice line for support and guidance.

Reduce problems

Absenteeism is high within Walsingham Support, with one large factor being individuals' sick due to mental health, particularly due to the pandemic and working through this. By introducing an EAP, we can hopefully reduce the high rate of absenteeism due to mental wellbeing.

There has also been a trend though Exit Interviews with reports of feeling burnt out of unhappy with the level of support. For example, out of 13 individuals' who left, 10 of those felt burnt out at work or unhappy with the level of support for their mental wellbeing. Introducing an EAP will hopefully assist in reducing the high turnover rate with Walsingham employees and help employees feel

valued and supported.

Introducing support for employees and their wellbeing (through an EAP) will also reduce the risk of legal cases being raised due to lack of support for staff.

The project objectives of introducing an EAP are to:

- Reduce absenteeism and staff turnover;
- Help boost morale and allow employees to feel more motivated and valued within the organisation;
- Provide specific training for managers to ensure they are able to support employees the best they can.

At this moment in time, we offer BUPA Occupational Health to staff, however, this does not cover ongoing support for mental wellbeing. Over the last 2 years with employees working through the pandemic, we should endeavour to put something in place to support their wellbeing.

This will not be a time-consuming project as with many EAPs, they offer a dedicated accounts manager to keep in touch with the organisation with any updates or concerns. They also provide a report on a monthly/quarterly basis (as requested) which will outline how many people used the service and what the majority of the calls were relating to (e.g. depression, anxiety, finances, etc) and this is all confidential with no names shared.

Within the HR Department, we propose that there is a project manager to oversee the benefits across the organisation, EAP included, and this will ensure the programme is monitored and employees are aware of the service and who to contact with queries about it.

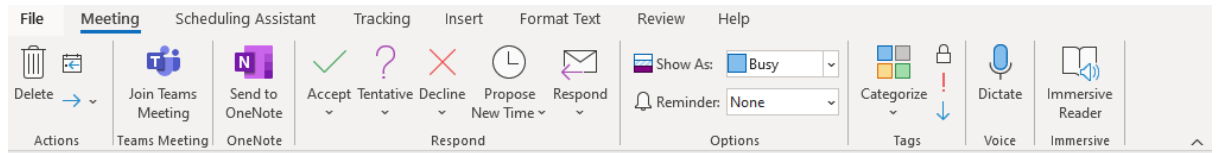
We propose the next few action steps in the short term until an EAP is approved:

- E-Learning module, specifically tailored for managers and employees, to raise awareness and understanding with what they can do to help.
- Create a wellbeing policy and procedure.

Overall, we believe Walsingham Support will highly benefit from the use of an EAP service to assist with employees' mental wellbeing, particularly as front-line staff's roles require them to care for individuals, we need to ensure we support them and value them as individuals. It will also support with reducing high absenteeism and, in turn, reduce high turnover rates.

Further information on specific EAP Providers can be provided.

EV 3.3



Accepted on 28/01/2021 10:16.

Induction

Organizer	Kim Maouhoub	Sent Thu 28/01/2021 10:13
Time	04 February 2021 09:30-11:00	
Location	Microsoft Teams Meeting	
Response	Accepted Change Response	

Microsoft Teams meeting

Join on your computer or mobile app

[Click here to join the meeting](#)

In Shared Folder Calendar - lucy.moriarty@walsingham.com

EV 3.4

6 Orientation - Month 2 1:1 Questions

Name:	Service & Region:
Start Date:	Meeting Date:
What do you like about the job and Walsingham Support so far?	
What has been going well?	
What are the highlights of your experiences so far?	
Why?	
Tell me what you don't understand about your job or about Walsingham Support now that you have had 2 months to settle into your role.	

Have you faced any surprises since joining us?
What could we have done differently during the interviewing process to realistically prepare you for your new role?
Any additional comments:
Signed and dated by Employee:
Signed and dated by HR:

EV 3.5

2/4/6 Orientation - Month 4 1:1 Questions

Name:	Service & Region:
Start Date:	Meeting Date:
Do you have enough, too much or too little time to do your work? Likewise, do you feel you have the right resources and tools to do your work?	
Do you feel you haven't been trained sufficiently in any aspects of your job to perform to the best of your ability?	
Do you see how your role contributes to the wider organisation? <i>*values?</i>	
In your opinion, what do you need to learn to improve?	

What do you want to, or hope to, achieve in the next 2 months to complete your initial review? Have your goals been discussed with and supported by your manager?
Compare Walsingham Support to what we explained it would be like when you interviewed with us. Have you experienced any surprises, disappointments or other 'aha!' moments?
How does the discussion/interaction go when your manager offers constructive criticism or corrects your work?
How would you describe the general tone of your co-workers: Do you find that they are supportive of your success, or somewhat pessimistic or critical?

Do you see any changes ahead; in other words, do you feel that in the next 2 months, you will need to change anything to remain focussed or do you feel you need further support with any aspects of your job? Or, are you happy with how things are going?

Signed and dated by Employee:

Signed and dated by HR:

EV 3.6

2/4/6 Orientation - Month 6 1:1 Questions

Name:	Service & Region:
Start Date:	Meeting Date:
Which co-workers have been particularly helpful since you arrived?	
Do you feel you haven't been trained sufficiently in any aspects of your job to perform to the best of your ability? <i>(The goal in asking this question is to pinpoint which employees can be influential in retaining new hires)</i> Would you recommend anyone to become a mentor/buddy to new employees?	
Who do you talk to when you have questions about your work? Do you feel comfortable asking? Has anyone gone out of their way to make you feel welcome or included?	
Have you had any uncomfortable situations or conflicts with managers, co-workers or people we support? Did you feel inclined to raise these matters with your manager or HR on any occasion?	

Does your manager clearly explain what is expected of you? How would you rate communication on a local and wider level on a scale of 1-10, with 10 being highest?
Do you believe your ideas and suggestions are valued? If you have suggested anything, can you give me an example of some type of change or idea you have suggested that has been implemented?
Looking back, was there anything we could have done differently in terms of setting your expectations appropriately for working at Walsingham Support, and for your job role specifically?
How would you rate us in terms of our induction process and extended onboarding, for example, the Corporate induction and this process, the 2/4/6 Orientation? Do you have any suggestions on where we could improve?

Signed and dated by Employee:
Signed and dated by HR: