

Qualification: CIPD Diploma in Applied Human Resources

5AEEG - Contributing to Employee Engagement

Word Count: 3392

Student Name: Lowri Ann Davies

Student Number: 1104209

CIPD Membership Number: 49370121

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: L Davies

Date: 27/09/2019

LO 1. Be able to assess levels of employee engagement within an organisation

Overview

Engagement from an employee's perspective is going above and beyond the expectations of their role because they have the correct conditions in place to achieve the best they can. They work to their values and contribute to the success of the organisation's goals (Johns and Ellis 2016).

Within the following portfolio, we have been tasked to undertake an assessment of employee engagement within our association. The following paragraphs will provide an overview of the tool and sample used to measure engagement within Bro Myrddin, to analyse the results and provide feedback on limitations and future steps.

Measuring Employee Engagement

When choosing the correct application tool to measure employee engagement within the organisation, I had a discussion with my line manager on what the association wanted out of the results. The primary focus for us was discovering the relationship between the organisation and employees and how they feel being part of the business (E001). With a diverse workforce ranging from age, behaviour, ability and culture, it is important for us to understand what the best approach would be to allow employees to work together and achieve organisational goals. Surveys are not only used to highlight the negative aspects, but the positives and the need to continue those specific areas that increase employee engagement (Gifford 2019).

Surveys are a proactive way of allowing employees to anonymously share their opinions and allow their voice to be heard but be ready to receive the findings and act upon them. It can support towards organisational development and future priorities. They are an inexpensive method and results can be requested within your own specific timeline (Taylor and Woodhams 2016)

Instead of reinventing the wheel and taking time to consult with senior management on questions to be used within the survey, it was agreed to use the Gallup Q12 survey (E002) as it provided an overall perspective from each body i.e. employee, line manager and organisation and is considered an accurate representation to gauge engagement (Gallup n.d.)

Reasoning for Engagement Survey

As there have been significant changes to the associations' sickness policy (E003), increase in non-monetary benefits made available to staff (E004), promotion of two-way communication between line managers and employees, and new starters (E005) it was believed that it would be useful to carry out an engagement survey to detect the current levels.

Sample

The Association has 41 employees, with 30 being based in Head Offices (E006). As it is the first time that the association have carried out an engagement survey including the Gallup Q12, it was agreed that it would only be circulated to members of the Corporate Resources department (E001). The chosen sample being the Corporate Resources Department comprises of 9 members of staff working across HR, Finance and ICT. This resulted in 22% of the workforce being chosen to participate in the employee engagement questionnaire.

As the responsible officer for investigating engagement within the workplace, I was responsible for collating and analysing the information received (E007). The return rate was 77.8% (7 of 9) and had two weeks to complete and return the survey. Along with this, we have collated the equalities monitoring data for members of the department (E008).

Analysis

When analysing the completed survey data, the most important questions for the association were 3, 6 7 and 8 (E002). The most common response to these questions were 'Yes'. As closed questions, there were no need for the respondents to comment any further, but some positive comments were received around being fully supported by line managers. This suggests that managers are engaged which is included as one of the four enablers of engagement (MacLeod and Clarke 2009).

Overall in (E009), there was a positive reaction to all questions with 'Yes' being answered 76 out of a potential 84 times. This data reflects that the employees are aware of the culture that the organisation is pursuing and is reflected in the policies and procedures that are used to achieve the response from the survey. These practices are the formation of the effort exhibited by employees to heighten engagement (Purcell 2010).

Limitations and Suggestions

For every survey, everyone is different and can interpret questions differently to their colleagues. By completing the form anonymously, vague and wrongly interpreted questions cannot be discussed further with the employee that had originally completed the survey (Taylor and Woodhams 2016).

Next time, I would suggest that the same questions be used but could include a comments box that would have to be filled to have a more understanding of which perspective the employee is answering. The equalities monitoring of the participants were varied (E008) and provided an overview of different categories of employees.

By only including one department within the organisation, it is possible that those employees would have a similar construed vision of the organisation due to the culture and priorities of the organisation being cascaded from their senior management through to assistants (Engage for Success n.d.). In future, a more varied sample from each position level and department within the whole organisation (including external locations) would provide more assurance of the results and qualitative data to be analysed to implement an action plan.

Also, employees can use surveys to share their true thoughts on the working of the association. The results from this can vary in accordance with an employee's emotional intelligence on day of completion (Taylor and Woodhams 2016).

LO2 – Be able to evaluate current organisational approaches to employee engagement.

To ensure that employees are ‘empowered, motivated and committed’ Johns and Ellis (2018) to their role within the organisation, there are conditions put in place to heighten these areas to allow them to achieve their best every day.

Sickness Absences and Well-being

It is important that staff are fit and healthy to carry out their roles and be present in the workplace. Below, it is demonstrated the number of working days lost to sickness over the past three years;

Year Ending	2018-19	2017-18	2016-17
No. of staff	37	28	36
No. of days	743	745	261.5
No. of staff long term	8	6	3
Total cost	£101,481	£64,252	£28,542

During the last year, 282.6 days were lost due to Mental Health illnesses, which accounted for 7 members of staff being absent for an average of 40.4 days each. The most common absence was colds, coughs and flu symptoms reporting 18 occasions during the year giving an average loss of 2.9 days per occasion. This equated to an overall absence rate of 7.8%. Minimising staff absences is crucial for the Association for several reasons (E010). The Association values its staff highly and has their wellbeing at the forefront of its thoughts, primarily for their personal regard, but in turn, for the continuation of the Association’s service delivery, as it relies heavily on its workforce delivering for residents and communities. The Association has recently completed a staff consultation on the introduction of SimplyHealth health care plan which was positively received and began from 1 April 2019 to coincide with the new financial tax year (E004). Ellis and Johns suggested that employees having better health and wellbeing will have better engagement levels (2016).

Mental Health illnesses are becoming more common to employers and are often associated with prolonged absences and the difficult transition back to the workplace. To overcome this area and develop the knowledge of both employees and line managers, training that has been arranged by the organisation on understanding and promoting positive mental health and wellbeing in the workplace has allowed employees to have open conversations around a difficult subject (E011 and E012), which allows employees to have the opportunity to voice their views (ACAS n.d.). The Association demonstrates their flexibility in the workplace but are mindful of its ability to offer reasonable adjustments by continuing to ensure that the employee fulfils its roles and obligations (Gifford 2018).

Within the Business Case for Employees’ Health and Wellbeing report produced by the 2010 Work Foundation, it was apparent that ill-health would be one of the biggest risks to productivity in the UK. By introducing the above measures and ensuring that line managers provide employees with the understanding that some illnesses cannot be prevented, presentism in the workplace and the commitment that the organisation has demonstrated towards employee wellbeing leads to happier and motivated employees (Gray 2014).

Labour Turnover

	Average head count	No. of leavers	Turnover
2018/19	39	9	23%
2017/18	37.5	10	26%
2016/17	37	6	16.6%

Employees that are more engaged are more likely to stay with their current employer and lower the turnover rates (Johns and Ellis 2016). Research indicates that employers seem to be taking more time investigating

why employees have left rather than what motivates them to stay within the organisation (XpertHR n.d.). According to Personnel today a survey conducted by Midland HR gathered that having a 'Relationships with line managers and colleagues and recognition of achievement were the top three contributors respectively to employees feeling engaged' (Personnel Today 2009). This is reiterated by XpertHR by advising that having better communication systems is associated with higher engagement, profitability and productivity. (XpertHR).

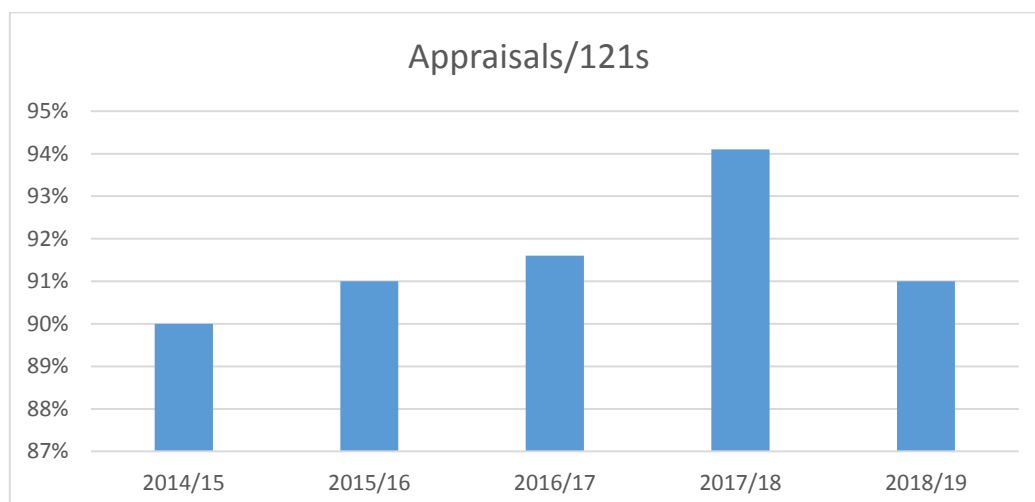
According to the Associations statistics, our turnover rates are above average in comparison to statistics from 2017 (Murphy 2018). When reviewing this information, it was noted that from the 25 leavers in the last three years, 15 of them had come from our Mental Health Hostels (E005). Overall, both hostels include a Project Manager, Senior Support Worker and 9 Mental Health Support Workers working to provide 24/7 care for 8 clients in two houses (E006). When investigating the differences between Head Office employees and Hostels, it was clear that there was less flexibility and fairness for the latter. Since April 2016, there have been 36 recruitment adverts for vacancies (E013). The time taken for the Corporate Resources department to process these requests have taken away from their ability to implement processes which have been proven to successfully engage staff and minimise the increase of staff resignations.

To allow staff to be retained, ensuring that employees are fully aware of their role and obligations through a thorough selection and induction process would ensure that they were capable and confident to fulfil their job. This includes allowing applicants to visit the hostels prior to interview to grasp the role (E014), referring to the values of the organisation within the interview (E015), completing mandatory training that is applicable to the workplace and shadowing line managers and colleagues which leads to developing relationships (E016). Hostel staff members have since been invited to attend all staff training days which allows them to understand the long-term goals of the organisation and how they are able to contribute to its success (Johns and Ellis 2016).

Performance Management

During a financial year, a line manager is expected to hold 6 supervision meetings, with one being replaced by the annual appraisal. Therefore, a performance meeting would be held every 2 months. They are held within the office, in a quiet room with at least an hour to allow line managers and employee to discuss each heading i.e. role and performance, health and safety, personal development etc. (E017).

Over the last three years, a consistent number of performance management meetings have been completed but the association expects the achievement to be 100% (E018).



Although the number is high by the year end, the HR department have spent a lot of time chasing paperwork for meetings and sending reminders to line managers to arrange the next meetings (E019). There is further concern that employees will compare themselves against other members of staff and the unfairness of not

receiving the same number of meetings. Employee engagement will be emphasised by continuing the allowance of employees to share their voice and opinions through performance meetings, which leads to them being more motivated to fulfil their role and in turn, lessening concerns that would be raised during future performance management (ACAS n.d.).

On the upper hand, there haven't been any formal grievances or disciplinary held over the last 12 months. This demonstrates that the association is integral and correlate with their accountable value by being open and honest with errors and working together to raise the concern and mitigate the risk for the future with an open-door policy (MacLeod and Clarke 2009).

Culture

The organisation consists of 42 members of staff, with 10 members sitting in the management and management bracket (E020). When reviewing our approach to decision making, senior management would have the final approval which would be cascaded from top to bottom. The approach is traditionally hierarchical with a unitarist approach but as discussed above, there is two-way communication frequently held to allow employees to share their thoughts and feelings for discussion between senior management (Taylor 2016).

Employees are not only motivated by pay but the benefits and reputation of working within an organisation. As noted above, the Association offer SimplyHealth private car plan, 30 days annual leave (above the statutory amount), four pension schemes, free car parking, budget for learning and development etc. as benefits considered to show their value and appreciation to employees (E021). It is attending work and how they can contribute to the purpose of the organisation (Ellis and Johns 2016). Within the last staff survey and staff training day, it had become apparent that communication continued to be an issue within the organisation. A company briefing had been used to share information with staff at the same time during staff meetings, but all the information wasn't considered applicable and was boring to read (E022). As a small organisation working in an open plan office, employees have overheard updates that might not have been applicable to them but then spread amongst the office. By ensuring that staff members are informed instantly of updates that relate to them and receiving quarterly updates of performance statistics that are submitted to the Board of Management, this will show the strategic narrative (E018) that they are kept updated with important matters but reminded of their commitment to the organisation by showing their contribution to achieving performance measures that leads into organisational goals and priorities (MacLeod and Clarke 2009).

LO 3. Be able to recommend and plan strategies to raise levels of employee engagement within an organisation. Consider low scoring areas for possible action.

External Information

To consider best practices, State of the Global Workforce study retrieved data from 155 countries worldwide. The most significant findings were that only 15% from 35% of working full-time employees were engaged in their current role (Gallup 2017). Within the report, they identified key areas that if they were taken more seriously, would achieve higher levels of engagement.

Developing a positive relationship with their employee, have routine performance management meetings and discuss personal development opportunities can only be fostered with a good manager in place. With managers that are fully aware of the current organisational strategic direction, managers can allow employees to use their initiative and talent to work independently or share their strengths within team activities. All these aspects will allow employees to feel more motivated and appreciated as part of the organisation (Johns and Ellis 2016)

To overcome employees becoming unmotivated and stuck in routine roles, organisations are moving towards more modern methods of transforming their organisation (Gallup 2017). By listening to employee voices, they're contribution can create an open culture, more consideration towards their views which leads to better wellbeing. Personnel Management reflects the positive use of qualitative data from bottom up by receiving feedback, listening and promoting opinions (Armstrong 2018).

Within the Harvard Business Review, there was a strong onus on clear communication between all stakeholders within a company as a common practice (2013). Organisations had taken time to ensure that employees were clearly informed of strategies and goals through different communication methods. By reflecting on the Gallup survey, having a line manager that has developed a trust-based relationship reinforcing this information, will have more of a buy in from employees. From many best-practice organisations interviewed, they were relating engagement and customer measures around profit with company goals. These areas when implemented well were the best measures in achieving high levels of employee engagement and organisational success (Harvard Business Review 2013).

When Armstrong, Olivier and Wilkinson examined engagement across teams, they identified four engagement zones that employees located themselves (2018). They included Contentment, Disengagement, Pseudo-Engagement and Engagement, which have been defined by behaviours and emotional intelligence. Preferably, teams would be in the Zone of Engagement but only 25% were recognised as part of the sample. This demonstrated that organisations believe that they're teams are engaged but they aren't showing the behaviours of a high achieving group. Similarly, to the above survey and findings, the areas that were most important to each zone were;

1. "Ensuring people are given challenging and varied work;
2. Working with trusted colleagues;
3. Having a team leader who is trusted and leads by example."

Armstrong, Olivier and Wilkinson (2016)

When comparing three companies within the top 10 of the Sunday Times Top 100 Mid Companies to work for, there were similarities in the benefits that were offered to employees to encourage high engagement. The survey was based around 8 different factors (E023). All three of them included personal development, wellbeing (i.e. gym membership, health insurance) and giving something back through charitable activities. These aren't considered traditional methods of retaining staff members, but it demonstrates that the workforce is changing (Johns and Ellis 2016). Vance advised that each organisation must measure engagement in a way that is suitable to them (2004). Armstrong highlighted that 29% of employees don't

find completing surveys useful to them and believe it is a tick the box exercise for HR (2018). Policies, procedures and strategies must be relatable and implemented to increase and maintain employee engagement.

Internal Information

During the last 6 months, the organisation has reviewed their management tier and agreed to arrange monthly meetings to share best practice and current corporate priorities (E024 and E025). At the meeting, it was agreed that management would be responsible for communicating with employees by sharing outcomes, recognition and actions (E025). During the Executive Management Team meeting, concerns have been raised that this information is not being diluted through the hierarchical levels and employees are losing out on vital information and praise (E026).

From this, it has effected employees understanding of their involvement within reaching operational goals and the success of the business. Employees have raised concerns that all decisions are made from the top bottom and that they don't have involvement in how the organisation is growing (E026). This clearly demonstrates poor communication channels, which are currently dependent on good and engaged leaders to motivate and share knowledge with their teams (Gifford 2017).

From the above external and internal data that has been retrieved, I believe that the following suggestions are appropriate in meeting current employee engagement demand;

Proposed Suggestion	Reasoning	Action to take	Implementation timeline
Employee Champions	There were concerns around employees not being made aware of changes and being able to share their views. (E026)	To include employee champions as part of every Task and Finish Group established by the association (Baczor 2019) (E029)	Ongoing
Developing a Health & Wellbeing Strategy	There needs to be clarity on what the Association can offer employees and a definition of engagement. This can demonstrate to employees how the organisation is able to keep them happy, motivated and productive (Suff 2019).	To create a Health & Wellbeing Task & Finish Group to gather content for the strategy and for HR to prepare a draft (E028).	Draft copy to be submitted to the Executive Management Team by March 2020.
Selecting appropriate tools for reporting engagement level	The Association don't have a tool in measuring engagement and are unaware if their employees are engaged or demonstrating the different zones (Armstrong, Oliver and Wilkinson 2016).	To include as topic in management meetings and share best practice suggestions (E024) (Gleeson 2018). To begin with conducting an Engagement Survey to gather current levels for comparison (E027).	September 2020.
Continue to invest in leadership development program	Having good leadership has been clear throughout the external and internal information gathered. It is required to allow clear communication avenues and developing trust based relationships with employees (Johns and Wills 2016)	To ensure that new starters (Leaders) are trained in leadership, coached by their manager during induction and refresher training every 3 years (E016).	Ongoing (dependent on recruitment levels)

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CIPD Candidate evidence matrix (EXAMPLE)

(CEM1)

Candidate name: Lowri Ann Davies			CIPD Membership/registration No.: 49370121		
Qualification title: Developing Professional Practice in Human Resources			Unique Learner No. (ULN): 1104209		
Unit code	Unit title	Evidence description	Evidence reference number	Assessor initials	I/V initials if sampled
5AEEG	Contributing to Employee Engagement	Professional Discussion From Line Manager	E001	LD	
5AEEG	Contributing to Employee Engagement	Gallup 12 Questions	E002	LD	
5AEEG	Contributing to Employee Engagement	Staff email – update to sickness policy	E003	LD	
5AEEG	Contributing to Employee Engagement	Staff Consultation email – SimplyHealth	E004	LD	
5AEEG	Contributing to Employee Engagement	Leavers from Hostels and Head Offices	E005	LD	
5AEEG	Contributing to Employee Engagement	Employees from Head Offices and Hostels	E006	LD	
5AEEG	Contributing to Employee Engagement	Employee Engagement Survey email to Corporate Resources Dept.	E007	LD	
5AEEG	Contributing to Employee Engagement	Equalities Data	E008	LD	
5AEEG	Contributing to Employee Engagement	Results of Survey	E009	LD	
5AEEG	Contributing to Employee Engagement	Sickness Absences Board Report	E010	LD	
5AEEG	Contributing to Employee Engagement	Mental health iAct on email footer	E011	LD	
5AEEG	Contributing to Employee Engagement	Flyer for Mental Health training	E012	LD	
5AEEG	Contributing to Employee Engagement	Interview Letter including invitation to hostels	E013	LD	
5AEEG	Contributing to Employee Engagement	Interview Questionnaire including values	E014	LD	
5AEEG	Contributing to Employee Engagement	Induction including mandatory training and shadowing	E015	LD	

5AEEG	Contributing to Employee Engagement	Supervision policy	E016	LD	
5AEEG	Contributing to Employee Engagement	Performance measures register	E017	LD	
5AEEG	Contributing to Employee Engagement	Reminder of performance meetings email	E019	LD	
5AEEG	Contributing to Employee Engagement	Staff Structure job titles only	E020	LD	
5AEEG	Contributing to Employee Engagement	Staff Benefits summary	E021	LD	
5AEEG	Contributing to Employee Engagement	Example of Team Briefing	E022	LD	
5AEEG	Contributing to Employee Engagement	Best companies - 8 Factors of Workplace Engagement	E023	LD	
5AEEG	Contributing to Employee Engagement	Management Meeting Agenda	E024	LD	
5AEEG	Contributing to Employee Engagement	Management Meeting Minutes and Actions	E025	LD	
5AEEG	Contributing to Employee Engagement	Minutes of Executive Management Team April 2019	E026	LD	
5AEEG	Contributing to Employee Engagement	Email advising of Resident Engagement Survey	E027	LD	
5AEEG	Contributing to Employee Engagement	Health and Safety Group calendar invitation	E028	LD	
5AEEG	Contributing to Employee Engagement	Data Protection Group Agenda – Employee Champion	E029	LD	

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:

L Davies

Date:

26/09/2019

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.

Professional Discussion

As part of our HR Strategic Plan, it was suggested for the association to review the current levels of engagement within the organisation due to a number of changes within the organisation. There had been;

- Additional benefits offered to employees but it had been based on best practice rather than sound evidence that it was required.
- Significant changes to policies that had been in place for a number of years.
- New starters.

There had only been one staff survey conducted by the organisation and didn't solely concentrate on engagement. In documentation published over the last few years, high levels of engagement has been recognised as increasing productivity and high performance within the workplace.

To marry up with our performance management practices, we were particularly interested in the relationship between employees, line managers and the organisation.

As a small organisation, it was agreed to use the Gallup 12 questionnaire to consider the above. It would provide an overview of employee engagement questions and won't be based on what the Senior Management Team had seen to be necessary. It was generic and used across the globe.

Due to the number of surveys and questionnaires that the staff have been involved in recently i.e. QED Survey, Investors in People, Small Workplace Health Award, I believed that it would be a good idea to sample the survey on the Corporate Resources department only.

Lowri Davies, Corporate Resources Officer would take responsibility of administering the survey and collate information within the agreed two week timescale.

Name: Rhian Layton

Department: HR

Job Title: HR Manager

Date: 30 August 2019

The Gallup Q12 Index

Gallup's employee engagement work is based on more than 30 years of in-depth behavioral economic research involving more than 17 million employees. Through rigorous research, Gallup has identified 12 core elements -- the Q12 -- that link powerfully to key business outcomes. These 12 statements emerged as those that best predict employee and workgroup performance.

The Twelve Questions are:

1. Do you know what is expected of you at work?
2. Do you have the materials and equipment to do your work right?
3. At work, do you have the opportunity to do what you do best every day?
4. In the last seven days, have you received recognition or praise for doing good work?
5. Does your supervisor, or someone at work, seem to care about you as a person?
6. Is there someone at work who encourages your development?
7. At work, do your opinions seem to count?
8. Does the mission/purpose of your company make you feel your job is important?
9. Are your associates (fellow employees) committed to doing quality work?
10. Do you have a best friend at work?
11. In the last six months, has someone at work talked to you about your progress?
12. In the last year, have you had opportunities to learn and grow?

From www.gallup.com

Lowri Davies

From: Lowri Davies
Sent: 01 August 2019 10:08
To: ALL Staff
Subject: Staff Portal - Policies and Procedures

Follow Up Flag: Follow up
Flag Status: Completed

Good morning,

Please be advised that the following policies and procedures have been added to the Staff Portal;

1. Anti-Bribery Policy

Changes to job titles.

2. Dress Code Policy

Policy has been updated.

3. Relocation Policy

Changes to job titles.

4. Homeworking Policy

Policy has been updated and the homeworking form has been removed. It is now a request email to your line manager to work from home.

5. Absence Management Policy and Procedure

The above policy was previously referred to as the Absence due to Sickness Policy. The procedure for the policy has been completely changed to meet current sector norm, new trigger points and unsure areas in our previous policy. The purpose of the new procedure is to support employees in their absence and allowing the Association to work collaboratively with employees to do as much as we can to support them in and out of the workplace. The policy will go live from 1 August 2019 therefore only absences moving forward will be considered against the new trigger points.

6. Employees Expenses and Subsistence Policy

Updated to remove the Essential Car User Allowance and the allowance amount for all claimants.

7. Gas safety check policy and procedure

This is a new procedure which has reflects the MOT style of gas servicing.

Please would you ensure that you familiarise yourself with their content and ask HR or your line manager any questions that arise.

Many thanks,
Lowri

From: Rhodri Jones
Sent: 17 October 2018, 11:51
To: All Office Staff and Hostels
Subject: Staff Consultation: Simplyhealth
Attachments: Simplyhealth Optimise Leaflet - Level 2.pdf

Follow Up Flag: Follow up
Flag Status: Completed



Good morning All,

As you will all be aware, the Association is passionate about the health, safety and wellbeing of its people and you, our staff are our most valuable asset.

At the recent Staff Away Day we announced our intention, having received Board Members unequivocal support and approval, to put in place the Simplyhealth cash plan (Optimise Health Plan) that will provide all employees with a number of benefits linked to health and wellbeing.

The plan allows you to be more health conscious by taking away some of the financial burden of healthcare for routine treatments, such as dental, optical and physiotherapy (up to an annual policy amount).

The plan's benefits can be summarised as follows;

- Comprehensive cover for everyday healthcare treatments (annual limits);
- Access to quicker treatment with no requirement for GP referrals;
- Access to discounted gym membership, online health risk assessments and health screening;
- Access to 24/7 GP helpline services;
- Up to four children under the age of 21, or 24 if in full-time education can be added to the plan for free.

Cost:

The Association would meet the cost of the plan however for tax purposes, such a provision is classed by HMRC as a benefit in kind, meaning the employee must pay tax on the value of the benefit received...in this case (level 2) it would mean most employees would 'pay' **£1.68 a month** (those paying higher rate of tax (40%) would 'pay' £3.36), this 'payment' would be a tax adjustment/deduction administered through your monthly payroll, once HMRC have been notified of the benefit in kind and duly amended their codes etc, and so there would be no need for you to do anything...only to remember to claim and make use of the plan.

Comparison:

Should you wish to arrange this plan yourself i.e. personal as opposed to business basis, it would cost £17.77 per month.

Condition:

Simplyhealth is an all or nothing plan for businesses meaning all employees must be 'in the pot' so there's no ability for individuals to opt in or out I'm afraid.

How it works:

You can claim money back towards the cost of check-ups and treatments (annual limit). You pay for your healthcare appointments as usual and then claim money back online or by post (see 'The detail' below for amounts and treatment types). You will complete a claim form and provide a receipt to evidence and claims are usually paid within a few days and can go directly in to your account. I've previously experienced the money going in to my account the very next day through the online claim process. Pending consultation, once signed up, Simplyhealth send out a welcome pack within 4 weeks, giving all the detail needed however attached you will find a leaflet containing all information in relation to the plan.

Consultation:

If all's well with our proposal, it is our intention to introduce this as soon as possible, so that you can start benefiting immediately, however we must first consult with you all to check that you do not have any objections.

This e-mail serves to commence our consultation period which will run to **Friday 26 October 2018**. I've checked the year planner and see no staff absences most of next week so hopefully all will have sufficient opportunity to consider and comment.

Should you have any queries or concerns, please feel free to speak/send through to myself or Rhian.

The detail:

Tabled below are the benefits the plan attracts, we propose to join at level 2 and if the plan proves to be worthwhile and used by employees, the Association is committed to look at increasing its level of cover and I've included cover levels either side of level 2 for comparison.

You will see from the table that the maximum cash benefit you could receive would stand at **£1,415 a year**, this is in addition to the myWellbeing benefits.

Optimise benefits	Payback level	Level 1	Level 2	Level 3
Optical Sight tests, prescription glasses and contact lenses	100%	£60	£75	£100
Dental Check-ups and treatments – fillings, crowns and bridges, dentures, hygienist's fees	100%	£60	£75	£100
Dental accident Treatment to return oral health to its pre-accident state	100%	£200	£300	£400
Physiotherapy, osteopathy, chiropractic, acupuncture and homeopathy	100%	£150	£200	£250
Chiropody, podiatry and reflexology	100%	£25	£50	£75
Diagnostic consultations, tests and scans Consultations to find or help find the cause of symptoms, including allergy testing	100%	£250	£300	£400
Health assessment Detailed health assessment with a nurse, doctor or pharmacist	100%	£50	£100	£250
Prescription charges Prescriptions issued by a GP or dentist	100%	£15	£20	£25

GP and dietitian fees, vaccinations and inoculations	100%	£75	£75	£75
Hospital cover Cash amount when admitted to hospital or staying overnight with children	20 days/ nights max each year	£20	£20	£20
New child payment (6 month qualifying period) Payment upon the birth or adoption of a child	One payment for each child	£200	£200	£200
myWellbeing¹ Speak to a GP; discounted membership at over 3000 gyms; counselling services; useful health information and more		✓	✓	✓
European cover Access these benefits during a trip of no longer than 28 days in the EEA and Switzerland		✓	✓	✓

Simplyhealth has been providing cost-effective, accessible, manageable health cash plans for over 100 years.

Thanks



Position	Employment Start Date	Employment End Date
Corporate Administrative Assistant	01/03/2016	06/05/2016
Senior Support Worker	01/10/2012	10/07/2016
Project Manager	04/07/2012	07/10/2016
Property Services Manager	03/05/2016	11/11/2016
Mental Health Support Worker	01/08/2016	31/12/2016
Mental Health Support Worker	14/09/2009	31/03/2017
Mental Health Support Worker	28/02/2017	07/04/2017
Mental Health Support Worker	14/04/2014	23/04/2017
Senior Support Worker	01/01/2017	27/04/2017
Handyperson	15/05/2014	12/07/2017
Mental Health Support Worker	01/01/1997	20/10/2017
Head of Corporate Resources	01/08/2009	20/10/2017
Mental Health Support Worker	26/01/2015	31/10/2017
Communications Advisor	15/05/2006	30/11/2017
Mental Health Support Worker	01/09/2017	14/01/2018
Customer Services Assistant	30/06/2014	08/02/2018
Senior Support Worker	27/11/2017	13/04/2018
Housing Officer	26/10/2007	18/05/2018
Mental Health Support Worker	01/04/2014	01/06/2018
Corporate Administrative Assistant	19/09/2016	30/06/2018
Finance Asistant	18/05/2015	31/08/2018
Mental Health Support Worker	28/02/2017	31/10/2018
Mental Health Support Worker	10/04/2015	07/11/2018
Asset Surveyor	16/12/1996	23/11/2018
Mental Health Support Worker	01/07/2018	05/12/2018

Position	Contract Type	Department
HR Manager	Full-time	Head Offices
Housing Officer	Part-time	Head Offices
Finance Officer	Full-time	Head Offices
ICT & Procurement Manager	Full-time	Head Offices
Housing Officer	Full-time	Head Offices
Customer Advisor	Part-time	Head Offices
Chief Executive	Full-time	Head Offices
Housing Officer (Income Management)	Part time	Head Offices
Finance Manager	Full-time	Head Offices
Elderly Services Assistant	Part Time	Head Offices
Customer Services Assistant	Part-time	Head Offices
Corporate Resources Officer	Full-time	Head Offices
Project Surveyor	Full-time	Head Offices
Assistant Surveyor	Full-time	Head Offices
Housing Services Manager	Full-time	Head Offices
Property Services Manager	Full-time	Head Offices
ICT Officer	Full-time	Head Offices
Customer Services Assistant	Full-time	Head Offices
Director of Corporate Resources	Full-time	Head Offices
Customer Services Assistant	Full-time	Head Offices
Customer Services Assistant	Full-time	Head Offices
Finance Assistant	Full-time	Head Offices
Housing & Financial Inclusion Officer	Full-time	Head Offices
Elderly Services Officer	Part-time	Head Offices
Finance Assistant	Part-time	Head Offices
Director of Operations	Full-time	Head Offices
Operations Manager	Full-time	Head Offices
Compliance & Asset Surveyor	Full-time	Head Offices
Housing Officer	Full-time	Head Offices
Housing Officer	Temporary Part time	Head Offices
Support Worker	Full-time	Hostels
Project Manager (Hostels)	Full-time	Hostels
Mental Health Support Worker	Full-time	Hostels
Senior Support Worker	Full-time	Hostels
Mental Health Support Worker	Full-time	Hostels
Mental Health Support Worker	Full-time	Hostels
Mental Health Support Worker	Full-time	Hostels
Mental Health Support Worker	Part-time	Hostels
Mental Health Support Worker	Part-time	Hostels
Mental Health Support Worker	Full-time	Hostels
Mental Health Support Worker	Full-time	Hostels









Lowri Davies

From: Lowri Davies
Sent: 25 September 2019 14:02
To: Lowri Davies
Subject: Employee Engagement Survey

Hi all,

The Corporate Resources department have been chosen to complete an Employee Engagement Survey to assess its levels within the organisation.

The questions are based around different areas within the organisation and will help us in determining services that we will continue providing and areas that will need to be actioned to achieve the best from our employees and ensure that they are happy and capable of fulfilling their role.

The questions used have been selected from the Gallup 12 survey. It has been suggested that the following 12 questions are the only ones that need to be used to measure engagement within the organisation. They have been used worldwide by numerous services.

1. Do you know what is expected of you at work?
2. Do you have the materials and equipment to do your work right?
3. At work, do you have the opportunity to do what you do best every day?
4. In the last seven days, have you received recognition or praise for doing good work?
5. Does your supervisor, or someone at work, seem to care about you as a person?
6. Is there someone at work who encourages your development?
7. At work, do your opinions seem to count?
8. Does the mission/purpose of your company make you feel your job is important?
9. Are your associates (fellow employees) committed to doing quality work?
10. Do you have a best friend at work?
11. In the last six months, has someone at work talked to you about your progress?
12. In the last year, have you had opportunities to learn and grow?

This is the [link](#) to the questionnaire. It is open from 12:00pm today and will close on 31 July 2019. Therefore you a timeframe of 2 weeks to complete.

It would be much appreciated if all of you would be willing to take the time to complete the survey. You are more than welcome to complete this in your own time or during work hours.

If you have any queries, please do not hesitate to ask.

Many thanks for all your help.

Lowri

Position	Number
Director	1
Manager	3
Officer	3
Assistant	2

Contract type	Number
Full-time / Permanent	8
Part-time / Permanent	1
Temporary	0

Age	Number
16 – 24	1
25 – 40	6
41 – 64	2
65 +	0

Sex	Number
Female	5
Male	4

Identify as transgender	Number
Yes	0
No	9

Ethnicity	Number
Asian	1
White British	7
White Other	1

Sexual Orientation	Number
Bisexual	0
Gay Man	0
Gay Woman	0
Heterosexual	9
Other	0

Disability	Number
Yes	0
No	9

Religion	Number
Any other religion	0
Buddhist	0
Christian (all denominations)	5
Hindu	0
Muslim	0
No religion	4
Other/preferred not to say	0

1. Do you know what is expected of you at work?

- Yes – we have regular 121's and appraisals as well as less formal meetings and catch ups, we have clear job descriptions and I would say expectations are known/spoken
- Yes
- Yes
- Yes
- Yes, job description in place.
- Yes, from regular performance management meetings to catch ups after a busy work
- Yes

2. Do you have the materials and equipment to do your work right?

- Yes – we're a multimillion pound organisation, we have great kit and systems and if there's a blockage somewhere, it can be alleviated
- Yes
- Yes
- Yes, DSE assessment carried out annually.
- Yes
- Yes
- Yes but we regularly look for improvements to streamline our time and allow time for other improvements

3. At work, do you have the opportunity to do what you do best every day?

- difficult to say every day as some things come and obstruct that ability but primarily yes
- no, due to the varied work I carry out some days are focused on areas that are not my strengths
- Yes
- Yes
- Yes
- Yes
- Yes, it is difficult at times to achieve the best due to personal issues but others around are understandable of everyone's circumstances.

4. In the last seven days, have you received recognition or praise for doing good work?

- I've been on leave but I get ample recognition
- Yes, for sorting out the IT issues following the power outages
- Yes
- can't recall
- no
- Yes
- Yes, from simple day to day tasks I get a thank you for support.

5. Does your supervisor, or someone at work, seem to care about you as a person?

- Yes – they understand me, my style, and preferences and take a professional interest in me and my life
- Yes
- Yes
- Yes
- Yes, regular supervision held in line with supervision policy.
- Yes
- Yes, they recognised when I needed help and a change in my behaviour.

6. Is there someone at work who encourages your development?

- Yes – I gain inspiration from all parts of the business and am very well supported by my direct report

- Yes, I have a clear strategy planned out with my manager
- Yes
- Yes
- Yes, line manager.
- Yes
- Yes, it is noted at each performance management meeting and can be offered at any time. Can view these by researching or receiving emails.

7. At work, do your opinions seem to count?

- Yes – we work together here and take time to gather opinions and make subsequent decisions from that learnt, inherently some decisions don't accord with all individuals' opinions but we have to make sometimes tough decisions.
- Yes
- Yes
- Most of the time Yes.
- Yes
- To an extent, it is normally only shared when asked for.

8. Does the mission/purpose of your company make you feel your job is important?

- Yes unequivocally so, what we do (the association) is incredibly valuable and i take great personal pride in being part of such
- Yes
- Yes
- Yes
- Yes
- Yes
- Yes, it is good to believe that we are providing a service for those living in the same community.

9. Are your associates (fellow employees) committed to doing quality work?

- Yes – you need only read our publications
- Yes
- Yes
- hope so
- Yes
- Yes
- Yes, sometimes we do forget why we are here as we carry on our day to day tasks, but it's brought back together during team meetings and staff training days.

10. Do you have a best friend at work?

- No – I'm of the belief we're all colleagues, I respect that other do seek friendships at work but it's never been my natural lean.
- Yes, everyone is my best friend
- I'm friends with everyone
- no, but everyone is very friendly and I am happy to work with such a nice bunch of people
- no
- no, I work with all colleagues at work – teamwork
- Yes, I believe that work and life have become more entwined in recent years.

11. In the last six months, has someone at work talked to you about your progress?

- Yes – we receive regular 121s and an annual appraisal
- Yes
- Yes
- Yes, discussed at 6 months appraisal
- Yes
- Yes. Regular every 2 months and ongoing progress on work tasks.
- Yes, annual performance appraisal meetings held.

12. In the last year, have you had opportunities to learn and grow?

- Yes, plenty of opportunities...opportunities are aplenty if we are motivated to seek and embrace them
- Yes, constantly.
- Yes
- been with the company just a bit less than 12 months so think it is not applicable to me
- Yes. I am currently working on a personal development programme.
- Yes, currently progressing with leadership programme.
- Yes
- Yes

Agenda Item:	10 PR 18
Report Title:	Staff Absences

Meeting Date:	4 June 2019
Report Author:	Director of Corporate Resources
Department:	Corporate Resources

Report Purpose:

- To **Note** ☒

Key Points:

Minimizing staff absences is crucial for the Association for a number of reasons. The Association values its staff highly and has their wellbeing at the forefront of its thoughts, primarily for their personal regard, but in turn, for the continuation of the Association's service delivery, as it relies heavily on its workforce delivering for residents and communities.

The level of absences has increased during the year with 53 absence occurrences amounting to a loss of 743 working days, 324 of these days (9 occurrences) relates to the Hostel services.

Anxiety/Stress/Depression proves to be the cause of the greatest number of days lost at 282.5 from 7 occurrences and the most common absence is due to colds, coughs and flu reporting 18 occasions during the year giving an average loss of 2.9 days per occasion.

Stress awareness and dealing with stress training has been arranged for all staff members in November and agenda item 04 PR 19 presents the option for implementing SimplyHealth health plan.

STAFF ABSENCES April 2018 – March 2019

From 1 April 2018 to 31 March 2019 the Association lost a total of 743 working days due to staff absences due to sickness.

The effective cost to the Association was £101,481.28.

The number of days is broken down between Departments as follows:

Department	No. of staff absences (working days)
Property & Customer Services	253.5
Maes yr Ysgol	231.0
Corporate Resources & CEO	123.0
Ffynnon Waun	93.0
Housing Services	42.5
Total	743.0

To allow the Association to monitor trends, for 2018/17 we have collated information on the reasons for absence. (Please find a more detailed report in Appendix A).

Reason	No. of days excl Bank Holidays	Ave days per absence
Anxiety/Stress/Depression/Other Psychiatric illnesses	282.5	40.4
Eye Problems	138.0	138.0
Heart, Cardiac and Circulatory Problems	77.0	77.0
Back Problems	75.0	37.5
Chest and Respiratory Problems	49.0	24.5
Cold, Cough, Flu - Influenza	45.0	2.6
Skin Disorders	18.0	9.0
Gastro-intestinal Problems	16.0	5.3
Vomiting and Diarrhea	14.5	1.6
Pregnancy Related Disorders	7.0	7.0
Endocrine/Glandular Problems	6.0	6.0
Other	5.0	5.0
Injury, Fracture	4.0	4.0
Surgery Related	3.0	3.0
Nervous System Disorders	2.0	2.0
Ear, Nose, Throat (ENT)	1.0	1.0

The table below shows number of staff/days and cost for the last 3 years:

Year Ending	2018-19	2017-18	2016-17
No. of staff	37	28	36
No. of days	743	745	261.5
No. of staff long term	8	6	3
No. of days long term	591.5	543	142
Total cost	£101, 481.28	£64,251.67	£28,541.90

Lowri Davies

From: Lowri Davies
Sent: 05 September 2019 10:23
To: Lowri Davies
Subject: FW: Scrutiny Meeting



Lowri Davies

Corporate Resources Officer | Swyddog Adnoddau
Corfforaethol

Lowri.davies@bromyrdin.co.uk | www.bromyrdin.co.uk

01267 232714 |



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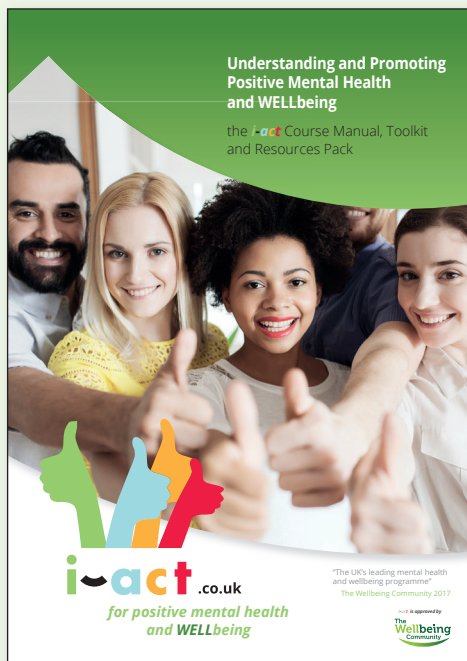
INVESTORS
IN PEOPLE

Proactive ♦ Together ♦ Accountable ♦ Motivated ♦ Efficient

Registered *i-act* for positive mental health and *WELL*being



Understanding and Promoting Positive Mental Health and WELLbeing in the Workplace



"The *i-act* training has given us easy-to-follow tools and techniques to help in assessing and improving our wellbeing at work. It has also given us a greater understanding and a first-response approach for supporting someone else who may be in distress due to a mental health or wellbeing issue."

- This *i-act* training is aimed at supporting employees/front-line workers to support others who may experience a mental health or wellbeing issue and to improve their own wellbeing in the workplace.
- This course comes with a 156-page evidence-based course manual, toolkit and resource pack (pictured left) for each participant.
- The manual includes over 45 tools to support employees and over 95 agencies/organisations to refer on to.
- The evidence-based *i-act* course and manual cites over 200 pieces of reputable references, researched by leading academics in the field.
- The course highlights how we can all improve our wellbeing to help build resilience.

Course objectives: the *i-act* course for ALL employees aims to:

- give participants a greater understanding of mental health and wellbeing issues and recognise when we may need further help and support
- provide some practical tools for managing stress, anxiety and low mood, and for promoting positive wellbeing to help build resilience
- offer guidance and advice for how we may connect with colleagues who may be experiencing a mental health or wellbeing issue
- equip participants with a resource pack, toolkit and signposting to further help and support concerning mental health and wellbeing issues.

Employment Start Date	Position
01/03/2016	Corporate Administrative Assistant
03/05/2016	Property Services Manager
01/08/2016	Mental Health Support Worker
19/09/2016	Corporate Administrative Assistant
28/11/2016	Project Manager (Hostels)
01/01/2017	Senior Support Worker
28/02/2017	Mental Health Support Worker
28/02/2017	Mental Health Support Worker
15/05/2017	Property Services Manager
15/05/2017	ICT Officer
01/09/2017	Mental Health Support Worker
27/11/2017	Senior Support Worker
05/12/2017	Mental Health Support Worker
01/04/2018	Customer Services Assistant
03/04/2018	Director of Corporate Resources
21/05/2018	Customer Services Assistant
18/06/2018	Customer Services & Comms Manager
20/06/2018	Customer Services Assistant
01/07/2018	Mental Health Support Worker
16/07/2018	Senior Support Worker
03/09/2018	Finance Assistant
03/12/2018	Housing & Financial Inclusion Officer
03/12/2018	Mental Health Support Worker
10/12/2018	Mental Health Support Worker
10/12/2018	Mental Health Support Worker
19/12/2018	Mental Health Support Worker
01/01/2019	Mental Health Support Worker
01/01/2019	Mental Health Support Worker
01/02/2019	Elderly Services Officer
01/02/2019	Finance Assistant
25/02/2019	Compliance & Asset Surveyor
01/04/2019	Director of Operations
20/05/2019	Mental Health Support Worker
01/07/2019	Operations Manager
05/08/2019	Compliance & Asset Surveyor
11/09/2019	Housing Officer

Post of Mental Health Support Worker

Further to your application for the above post with Bro Myrddin Housing Association, we are pleased to confirm that you have been shortlisted for the position.

Interviews have been arranged for **Monday, 15 April 2019** and will take the form of a formal 30 minute interview.

The interview panel will comprise of xxxxxx

You are requested to attend the Association's Offices at the above address at **10:45** on that day. Please advise us in advance if you have special requirements, for example regarding access to the building.

When you attend you should bring evidence of your right to work in the UK together with evidence of any relevant qualifications e.g. NVQ certificates.

Prior to the interview day, if you have not already done so, you are invited to visit one or both of the projects to meet some of the residents. Please contact xxxx on 01267 234567 and she will make the necessary arrangements. The successful applicant **will be required** to meet with the residents before any offer of employment is confirmed.

We request you confirm your availability to attend the interview by contacting 01267 232714 or e-mail lowri.davies@bromyrdin.co.uk by **midday on Friday, 12 April 2019**.

Should you be unable to attend or decide to withdraw your application, please contact us immediately.

We look forward to seeing you on 15th.

BRO MYRDDIN HOUSING ASSOCIATION INTERVIEW REPORT FORM

POST:

DATE OF INTERVIEWS:

PANEL MEMBERS :

APPLICANT'S FULL NAME:

SCORING:

1. DOES NOT REACH STANDARD REQUIRED
2. REQUIRES FURTHER TRAINING
3. MEETS REQUIREMENT OF ROLE
4. EXCEEDS REQUIREMENT OF ROLE

No	Questions These should be clearly LINKED TO competency requirements/person specification	Score (1-4)	Comments/evidence
1	Why are you applying for this role?		
2	In order of importance, name 5 core competencies you see as required for the role of a Housing Officer at Bro Myrddin Housing Association?		
3	Resident participation across the housing sector has always been a challenge. How can Bro Myrddin engage better with our residents?		
4	Frontline housing workers are expected to be much more 'commercially minded' in the future than they are now. Why do you think this is?		

5	Under what conditions do you work best and worst?		
6	Resilience is a foundational characteristic of vibrant and healthy communities. As a Housing Officer how could you help to build resilience within our communities?		
7	When was the last time you worked as part of a successful team? What did you do to contribute to it?		
8	What factors should we consider when assessing affordability for rent setting purposes?		
9	Thinking about the values of BMHA, which come most naturally to you and why?		
	TOTAL		
	OTHER COMMENTS e.g. questions from applicant		
	DBS Check (if applicable)		
	REFERENCES (clarification if necessary)		
	NOTICE PERIOD		

Induction for Permanent Scheme Based Employee
Job Title: Senior Support Worker

Day 1: 20 May 2019

Arrive at BMHA Office to meet with

Head Office (09:00)

HR Update with Lowri Davies

- Requesting holiday & other leave
- Organisation – general overview
- Expenses & Subsistence claims
- Take photo to receive ID badge
- Equality and Diversity
- Forms (Declaration of Interest, Equality and Diversity, Section 48)
- Vehicle Insurance
- Data Protection (GDPR)
- Log in details
- Risk Register
- Contract of Employment
- Payroll (Payslip/Pension/Absences/Personnel Information form)
- HMRC (P45 / Starter Checklist)

Meet senior colleagues and other employees connected to the role:

Meet with HR

Meet with Finance

Meet with Maintenance team

Meet members of the wider BMHA service based at the Office.

Pension meeting with Finance Manager

Head Office (10:00)

ICT meeting with, ICT & Procurement Manager

Head Office (10:30)

GDPR (General Data Protection Regulation) Training

Head Office (11:00)

Manual Handling and Equality and Diversity training

Head Office (12:00)

Arrive to meet with Project Manager

FFW (14:00)

- Meet residents and scheme team on duty (this to include all team members over coming period)
- Tour of scheme
- Basic Health & Safety procedures
- Fire exits/assembly point/first aiders

Day 2: 11 December 2018

Meet with Corporate Assistant to complete remainder of mandatory training.

Head Office (09:00)

Food Hygiene

Head Office (09:00)

Safeguarding

Head Office (10:00)

Arrive at Maes yr Ysgol

FFW (11:00)

- Organisation and scheme - general overview
- Medication – procedure of dispensing, re-ordering and ‘booking in’
- Petty Cash and ordering of monies
- Council returns
- Scheme based systems: Logging in Book, Communication Book, Diary, Daily Record Sheets, Rotas, Annual Leave charts, Support Planning and Risk Management (residents), Risk Management (scheme based procedures – Ellis Whittam) etc.
- Discuss Policies and Procedures
- Staff section of Intranet
- Process of familiarization, ie, in relation to above, to continue over coming days/weeks
- Discuss job role in relation to understanding processes and work flow

Afternoon

Day 3/4/5:

- Boots Medication
- Work alongside colleagues
- Further investigate and understand Work Processes
- Visit **Maes yr Ysgol / Ffynnon Waun** – introduce to residents and staff team
- Tour of scheme
- Basic Health & Safety procedures
- Fire exits/assembly point/first aiders
- Further discuss job role in relation to understanding processes and work flow
- Discuss residents at Maes yr Ysgol / Ffynnon Waun in brief detail.
- Discuss training needs.
- Discuss staff team and supervision/appraisals and team meetings.
- Discuss funding issues from stake holders.
- Identify risks

FFW

Training

Manual handling: Date of completion

GDPR: Date of completion

Food Hygiene: Date of completion

Safeguarding: Date of completion

Boots Meds: Date of completion

Identifying training needs – this process will continue throughout probationary period and beyond.

- Ensure that over next coming weeks, meet CPNs, Care-coordinators etc. i.e. Rose Beardmore. Establish contact with all interested parties, i.e. family members.
- Hold Team Meeting, more formally introduce post holder to the team.
- Successfully complete the Social Care Induction Framework.
- Discuss with new employee ‘how the day has gone’ at the end of each day in first week, to ensure all is well and address any issues

This process will continue throughout probationary period and beyond, as Induction form/procedure is complete.

I confirm I have participated in the above Induction and I have been informed, understand and accept all the employees’ related policies

Signed..... Date.....

I confirm this Induction has been satisfactorily completed for the above employee

Signed..... Date.....

Return to HR Manager on completion.

BRO MYRDDIN HOUSING ASSOCIATION

SUPERVISION POLICY AND PROCEDURE

1. WHAT IS SUPERVISION?

Supervision is a support provided to all Association employees. It provides assistance on a one to one basis to support work planning, performance management and personal development.

It is provided on a one to one basis and is used to identify achievements, develop any necessary work plans and deal with any instances of under performing.

Supervision links to the disciplinary and capability policy in that it is the starting point for dealing with concerns outside of any formal procedures. The process also reflects competent, accountable practice, continuing professional development and personal support and guidance.

Employee skills, motivation and relationships with service users and customers are key elements in determining quality of service. These key elements can be enhanced by supervision.

Every employee has the right to regular, planned supervision.

To be effective, supervision should be:

- Viewed as an opportunity for shared reflection on work.
- Seen as part of a culture that promotes reflective practice/evidence based practice, self-directed learning and learning from experience.
- An integral part of the working routine.
- Approached in a positive, constructive, honest, open and forward-looking manner.

It should be noted that a separate Policy exists for Senior Officers. Please refer to Performance Management of Senior Officers Policy and Procedure.

2. PURPOSE AND SCOPE OF THE POLICY

The purpose of the policy is to promote a consistent approach to employee supervision throughout the organisation, to ensure that individual management supervision of employees is geared to achieving its objectives. Supervision is also the primary forum by which the personal impact on employees of their work is addressed.

This policy applies to all employees of the Association, those providing services direct to members of the public and those providing 'support' services; those on 'temporary' and those on 'permanent' contracts and the policy has been reviewed in line with the Association's commitment to equality of opportunity.

Where an employee feels they are not being provided with supervision as described within this policy they have recourse to the grievance procedure.

Managers failing to implement this policy could be subject to the disciplinary or capability process.

3. ROLE AND RESPONSIBILITIES

Line Managers' role includes:

- Ensuring that any managers they supervise also carry out this policy.
- Being fair and supportive.

- Being sensitive to the supervisee's needs.
- Creating a climate conducive to the sharing of good practice.
- Monitoring the employee's progress on meeting objectives (as set in the Business Plan, Operational Plan and previous Supervision meetings).
- Addressing any under performance (this should be seen as the informal part of the capability or disciplinary policy).
- Offering constructive feedback.
- Listening carefully and responding appropriately.
- Recognising achievements.
- Giving guidance on policy and practice matters.
- Dealing with anxieties and dissatisfactions affecting work performance
- Making themselves available for discussion outside of supervision sessions.

Line Managers are responsible for ensuring that:

- All employees receive regular and quality supervision.
- The supervision process is linked to the probationary review, induction, performance appraisal, and interim review systems operating within the association.
- The Association's values are promoted and adhered to.
- Training and development opportunities for employees are identified, facilitated and evaluated.
- A record of all supervision sessions is maintained and made available for inspection and audit by Senior Managers. (See an example template at Appendix 1).

Employees' role includes:

- Reporting on progress on meeting objectives (as set in the Business Plan, Operational Plan and previous Supervision meetings).
- Identifying aspects of good practice and obstacles in achieving targets.
- Assessing their own performance.
- Commitment to personal development and skill acquisition.
- Identifying training and development needs.
- Being open to challenge, accepting direction and advice, actively contribute to work planning.
- Bringing relevant information on policy and practice, where appropriate to supervision.
- Alerting supervisor to particular matters of concern.

Employees are responsible for:

- Preparing for and taking part in supervision under the arrangements agreed.
- Reflecting and learning from their work experience, training and development opportunities.
- Providing evidence of the work done, including the quality of work in relation to standards expected.
- Taking any action agreed in supervision, to improve performance and enhance their effectiveness.
- Adhering to the Association's values.

4. STRUCTURES AND METHODS OF SUPERVISION

Supervision should:

- Normally be undertaken on a one-to- one basis.
- Be structured.
- May include 'live' supervision / observation of work, examination of records, taped material, or simulation.
- Include reflection on incidents and problem solving.

5. CLIENT BASED SUPERVISION

Employees who are working with clients will need a type of supervision that focuses on the management and evaluation of these cases. This is generally in addition to the supervision that they receive for their day to day work. Client based supervision includes all the components of mainstream supervision and takes into account the additional aspects noted below:

- Client based supervision can be undertaken in a variety of setting including one to one or team setting.
- In every case the supervisor's responsibility is to promote a safe atmosphere to promote the sharing of experiences.
- Client based supervision can enable a team to share good practice and allow for joint problem solving.

6. PROCEDURES

Frequency

Supervision should take place once every 8 weeks. One Supervision meeting will be replaced by the annual Performance Appraisal. Each manager and employee will agree the planned frequency of supervision and book advance dates in their diary. Additional unplanned supervision will also be available to all employees if required.

Venue

The manager should ensure that the venue for supervision will provide confidentiality, comfort and be without distractions. All phones should be turned off or diverted at the start of each session.

Arrangements

Supervision sessions should be planned in advance and be accorded the highest priority. If it is necessary to cancel a session a new date should be agreed upon immediately.

Signing Off

The manager will ensure that the supervision paperwork is completed, signed-off and returned to the Corporate Administrative Assistant and/or HR Manager within 2 weeks.

Keeping Records (see 8 below)

The manager should record the supervision session on the appropriate form. All records should be signed by supervisee and manager as agreed and stored in a secure location.

Where agreement is not reached each party should identify the area of disagreement and this record should be kept with the supervision files.

Supervision notes are usually kept between supervisee and manager however employees must be aware that there are exceptions e.g.:-

- For any audit requirements.
- During line managers supervision.
- During any formal capability/disciplinary action.
- During external inspections.

7. TOPICS FOR DISCUSSION AT SUPERVISION

The following is an indicative list of some of the topics that may be discussed at supervision

- Role / Performance issues
- Personal Development (eg training undertaken / needed)

- Personal issues (eg workload, support)
- Review of TOIL / Paid Overtime / Annual Leave / Sick Leave
- Identification of Good Practice / Suggestions for improvements
- Risks
- Health, Safety, and Wellbeing
- Equality & Diversity
- Update on Policies and Procedures
- Agreement of clear, realistic, measurable objectives and activities for work and personal development during period to next planned supervision.
- Supervision Reflection Form (Support Workers only (Appendix 2))
- Any other topics either party wishes to discuss.

8. RECORDS

Records of supervision sessions must be kept in a secure location with a copy given to the supervisee. They should be clear and legible (preferably typed).

Supervision records are the property of the employer and should be available for management examination when requested (see 6 above).

Where an employee obtains a different job within the organisation supervision records will be transferred to the new supervisor. This should be explained to the employee prior to the record being transferred.

Records should be kept for 6 months after an employee has left the organisation and then destroyed.

9. REVIEW

This policy and procedure will be reviewed every three years and the review will incorporate obtaining feedback from employees across the organisation.

Version	4
Date of Policy	November 2017
Date approved by P&R Committee	November 2017
Next review date	November 2020
Responsible person	Director of Corporate Resources

Bro Myrddin Housing Association Supervision Record

Employee's name		
Manager's name		
Date, time and venue of meeting		
Agenda	Action points by whom and by when	
1. Review of Minutes of previous meeting		
2. Matters arising		
3. Role/Performance Issues		
4. Personal Development (eg training undertaken/needed)		
5. Personal Issues (eg workload, support)		
6. Review of TOIL/Paid Overtime/Annual Leave/Sick Leave position TOIL: x hours Paid overtime (April 20XX – March 20XX): x hours Annual leave (eg. 1 XX 2017 – 31 XX 2018) xx days Sick leave (eg. 1 XX 2017 – 31 XX 2018): xx days		
7. Identification of Good Practice / Suggestions for improvements		
8. Risks		
9. Health, Safety & Wellbeing		
10. Equality & Diversity		
11. Update on Policies and Procedures		
12. AOB		
Date of Next Meeting:		

Signed by Supervisor		Date	
Signed by Supervisee		Date	

Name:**Proposed Date:**

**How is my resident doing in the following key areas?
National Well- being outcomes**

Resident Name: <i>Please comment on the activities, events that your resident has been involved in.</i>	
Well being Securing rights and entitlements - Control over day to day life - Having a better quality of life - Treated with dignity & respect - Information, advice and assistance- signposting - Involved indecision making	
Physical and mental health & emotional well being - Smoking - Healthy weight - Healthy eating - Activity General health - Falls /trips	
Protection from abuse and neglect - Able to understand the signs and dangers - Feeling safe	
Education, training and recreation - Doing what is important to aid own independence	
Domestic, family and personal relationships - Being part of local community - Feeling safe in the community - Loneliness	
Contribution made to society - Feeling worthwhile - Volunteering - Community activities	
Social and economic well being	
Suitability of living accommodation - Suitable for needs and feeling supported	
Date of last 6 month review:	Date of last Care & Treatment Plan Review:

To help focus and prepare and enable you to get more out of your supervision, I invite you to take some to reflect on your past two months.

Do I have holiday/toil to discuss?

Is there anything else I really want to discuss in my supervision?

1. Circle appropriate answers, and comment below

(a) Do you have an up-to-date job description? ☐ Yes ☐ No

(a) Do you have an up-to-date action plan? ☐ Yes ☐ No

(b) Do you understand all the requirements of your job?
☐ Yes ☐ No

(c) Do you have regular opportunities to discuss your work, and action plans?
☐ Yes ☐ No

(d) Have you carried out the improvements agreed with your manager which were made at the last appropriate meeting?
☐ Yes ☐ No

2. What have you accomplished, over and above the minimum requirements of your job description, in the period under review (consider the early part of the period as well as more recent events)? Have you made any innovations?

.....

3. List any difficulties you have in carrying out your work. Were there any obstacles outside your own control which prevented you from performing effectively?

.....

4. What parts of your job, do you:

(a) do best?

.....

(b) do less well?

.....

have difficulty with?

.....

(c) fail to enjoy?

.....

5. Have you any skills, aptitudes, or knowledge not fully utilised in your job? If so, what are they and how could they be used?

.....

6. Can you suggest training which would help to improve your performance or development?

.....

7. Additional remarks, notes, questions, or suggestions

.....

		2015/16	2016/17	2017/18	2018/19	2019/20 Target
1. Improve our legacy homes						
1.1	WHQS					
	No. of Acceptable fails - Resident Choice				145	
	No. of units with Resident choice Acceptable Fails				119	
	No. of Acceptable fails - Physical Constraint				95	
	No. of units with Physical Constraints Acceptable Fails				64	
	No. of Acceptable fails - Timing of Remedy				586	
	No. of units with Timing of Remedy Acceptable Fails				348	
	No. of new Acceptable fails from new Condition Surveys				0	
	No. of Acceptable Fails reduced through planned works					
	% of homes Condition Surveyed				76.5%	100%
1.2	Component upgrades					
	No. of new Kitchens upgrades				52	15
	No. of Kitchen Acceptable fails				24	40
	No. of new bathrooms upgrades				29	15
	No. of bathroom Acceptable fails				81	94
	No. of new heating upgrades				12	133
	No. of heating Acceptable fails				20	20
	No. of new window upgrades				1	12
	No. of window Acceptable fails				0	0
	No. of new door upgrades				24	30
	No. of door Acceptable fails				0	0
1.3	SAP/EPCs matters (affordability)					
	Average EPC/SAP rating - combined				69.3	70.0
	Average EPC/SAP rating - general needs				68.9	70.0
1.4	Asset Management					
	Ratio of Responsive to Planned Maintenance				33/67	40/60
	Total spent on void properties in first 6 months of new tenancy - cumulative					
	Total spent on void properties in first 6 months of mutual exchanges- cumulative					

			2015/16	2016/17	2017/18	2018/19	2019/20 Target
2. Maintain our homes, communities and tenancies							
2.1	Landlord health & safety & compliance						
	% rate of homes with valid certificates – gas				100%	100%	100%
	% rate of homes with valid certificates – electric				100%	100%	100%
	% rate of homes with valid certificates – oil				100%	100%	100%
	% rate of homes with valid certificates – coal				100%	100%	100%
	% rate of sites with a valid inspection report – legionella				100%	100%	100%
	% rate of homes and schemes with valid reports – asbestos					99.09%	100%
	Fire Risk Assessments completed				100%	100%	100%
	Fire Risk Assessments outstanding					0	0
	Fire Risk Assessments No. actions					0	0
2.2	Repairs						
	Emergency - No. completed		951	943	888	840	675
	Emergency - Days taken		0.75	0.75	0.75	0.75	0.9
	Urgent - No. completed		1343	1446	1632	1820	945
	Urgent - Days taken		2.92	2.82	2.7	3.62	4
	Routine - No. completed		1603	1413	1084	1627	1081
	Routine - Days taken		9.66	9.95	11.6	13.41	14
	Average cost of void repairs		£1,372.53	£1,363.69	£1,355.41	£1,297.00	£1,355.00
	% of repairs over £1,000 with post inspections completed		100%	100%	100%	100%	100%
2.3	Sustainable tenancies						
	% of current tenancies that are over 12 months in duration					90%	90%
	% of tenancies ended which lasted over 12 months					87%	90%
	No. of tenants evicted - cumulative		5	7	2	3	
	% satisfaction with the quality of our homes at letting stage				92%	90%	
	% satisfaction with our allocations/lettings				91%	94%	
	% no. of sheltered housing tenants with an up to date support plan in place				100%	100%	100%
	No. of Residents on HB under-occupying		79	81	71	79	
	Reasons for ending tenancies - held seperately						

		2015/16	2016/17	2017/18	2018/19	2019/20 Target
2.4	Maximising income					
	Voids: Average relet days - standard empty	17.9	3.2	2.6	0.8	7
	Voids: Average relet days - component replacement	32.6	13	13.5	14.8	21
	Voids: Average relet days - Major repairs	63	54.8	32.9	30.17	90
	Number of Tenancy turnovers - cumulative	127	91	132	91	
	Arrears: Rent arrears net of anticipated HB as a % of annual rent debit		1.89	1.91	1.7	2.0
	Arrears: No. of tenancies in arrears but in sync					
	Arrears: No. of tenancies in arrears not in sync					
	Arrears: Former tenant arrears as a % of the annual rent debit		1.59	1.68	1.7	2.0
	Financial inclusion referrals - cumulative	159	194	235	208	
	Financial inclusion engagements - cumulative	n/a	183	262	241	
	No. of UC Cases			20	53	
	Average arrears of tenancies on UC - snapshot			£425	£320	
	% of UC cases with an APA in payment			80%	45%	

		2015/16	2016/17	2017/18	2018/19	2019/20 Target
3. Deliver more social and affordable homes						
3.1	Stock count					
	General Needs Units		765	805	810	852
	Sheltered Housing Units		68	68	68	68
	Supported Housing bedspaces		8	8	8	8
	Shared Ownership properties		2	2	2	2
	Homebuy properties		25	25	25	25
3.2	Development activity					
	No. of units completed			32	0	42
	No. of on-site development schemes			3	4	2
	Units under construction			45	89	47
	Number of approved development schemes not on-site			0	0	1
	Total new units approved not on-site			0	0	48
	Number of other development schemes on PDP			36	1	1
	Total units of other developments on PDP			0	48	20
	% of development bonds checked (and active)			n/a		100%
3.3	Provide good quality, affordable homes					
	Ave score given by residents re new home		8.5	9	9	9
	Weighted average rent (including service charges) - flats				£88.76	£86.36
	Weighted average rent (including service charges) - bungalows				£96.60	£98.15
	Weighted average rent (including service charges) - houses				£97.00	£98.48
3.4	Increase stock in Pembrokeshire					
	Number of units on Pembs PDP		0	0	0	1
3.5	Land bank for future needs					
	Number of sites held for development				1	1
	Number of land acquisitions in pipeline				0	1

		2015/16	2016/17	2017/18	2018/19	2019/20 Target
4. Focus on our people and communities						
4.1	Resident engagement					
	No. of contacts from Residents through - telephones				5997	n/a
	No. of engagements through - Social media (Facebook/ Twitter)				n/a	n/a
	No. of contacts from Residents through - in person				3633	n/a
	No. of contacts from Residents through - website/App				10	n/a
	No. of contacts from Residents through - other (SMS, surveys, emails, Fax)				2711	n/a
	Resident Forum meetings				1	1
	Resident Forum members	6	7	4	4	5+
	No. of residents who have engaged in resident participation (Resident meetings and estate walkabouts)	111	226	99	59	200
	No. of compliments received				52	n/a
	No. of complaints received				25	n/a
	% of complaints resolved at stage 1		89%	100%	100%	100%
	No. of complaints at stage 2		2	0	0	0
	No. of "You said, We did" entries	13	12	11	12	12
4.2	Neighbourhood coaching service					
	% no. of ASB cases resolved successfully			88%	95%	99%
	% of Resident profiling completed - (phase 1 & 2)			99%	97%	100%
4.3	Investing in our people					
	Ave No. of training days provided per Staff member - cumulative	7.7	10.5	10.8	13.3	7
	Total spend on staff training	£ 31,877.44	£ 36,829.24	£ 24,129.29	£ 35,078.00	£40,000
	No. of vocational experience days provided to community groups/individuals				8	5
	% of 121/Appraisal meetings completed	91%	91.60%	94.10%	91%	100%
	No. of team briefings/meetings	100%	100%	100%	100%	100%
4.4	Maximising attendance					
	Total days lost through sickness	261.5	745	743	205.5	180
	No. of short-term sick instances	36	61	45	56	40
	No. of long-term sicknesses instances	4	6	8	2	2

		2015/16	2016/17	2017/18	2018/19	2019/20 Target
4.5	Lean/efficient working					
	Lean working reviews completed				n/a	1
	Lean working recommendations made				n/a	n/a
	Lean working recommendations implemented				n/a	100%
4.6	Community benefits					
	No. of Community Benefits delivered (toolkits)	5	6	4	7	5
	Monetary value of Community Benefits delivered	n/a	n/a	n/a	£50	TBC
	Average Welsh local multiplier	1.32	1.54	1.48	1.78	1.5
	% of tenders returned generating Community Benefits		70%	100%	100%	100%
	Balance of Community Fund	n/a	n/a	n/a	£50	TBC

		2015/16	2016/17	2017/18	2018/19	2019/20 Target
5. Well-run business						
5.1	Risk Management					
	Number of strategic risks identified				29	
	Number of strategic risks scoring 8 or above (on BAF)				9	
	No. of actions required from Board Assurance framework				1	0
	Number of ICT Pen testing completed - cumulative	n/a	n/a	n/a	1	4
	Number of material issues raised by Pen testing - cumulative	n/a	n/a	n/a	1	0
	No. of Welsh Government submission deadlines missed			1*	0	0
	No. of Data Protection breaches	0	0	0	0	0
	No. of phishing campaigns - cumulative	n/a	n/a	n/a	2	4
	Loan working incidents	0	0	0	0	0
5.2	Financial Position					
	No. of months liquidity (cash only) at period end			18+ months	18+months	18+ months
	No. of unencumbered units			189	232	274
	Estimated value of unencumbered units (MV_STT)			£ 13,000,000	£ 16,240,000	£ 21,920,000
5.3	Internal control environment					
	% of managers completed quarterly compliance statement				n/a	100%
	No. of breaches of Financial Regulations				0	0
	No. of Internal Control failures				0	0
	No. of Internal Audit Reviews completed	7	7	4	6	11
	No. of Internal Audit recommendations outstanding	1	6	5	2	5
	No. of recommendations made by External Auditors	3	0	4	1	0

		2015/16	2016/17	2017/18	2018/19	2019/20 Target
5.4	Data Validation					
	Narrative only					
5.5	Value for Money Stats					
	Total operating costs per social housing unit	£ 3,075	£ 3,115	£ 3,117	£ 3,275	
	Management costs per Social Housing unit	£ 1,090	£ 1,115	£ 1,261	£ 1,338	#REF!
	Reactive repair costs per Social Housing unit	£ 1,087	£ 1,202	£ 1,212	£ 1,229	#REF!
	CapEx MR and Component costs per Social Housing unit	£ 479	£ 650	£ 612	£ 637	#REF!
	CapEx and Rev MR and component costs per Social Housing unit	n/a	£ 1,063	£ 983	£ 1,098	#REF!
	Bad debts per Social Housing unit	£ 35	£ 32	£ 31	£ 40	
	Weighted average cost of capital	3.8%	3.7%	3.6%	2.9%	
	Free cash flow/unit (before draw down or repayment of loans)	£ 422	£ 183	£ 107	£ 950	
	Gross Arrears/Social Housing turnover	5.1%	4.8%	4.9%	5.2%	
	Total Turnover per Social Housing unit	£ 5,018	£ 5,189	£ 5,308	£ 5,509	
	Rental void loss per Social Housing unit	£ 54	£ 64	£ 60	£ 66	

Lowri Davies

From: Lowri Davies
Sent: 28 June 2019 09:37
To: Rhodri Jones; Tracy Rees; Rhian Layton; Matt Allen; Mathew Davies; Clare James; Paul Edwards; Helen Williams; Mandy Sharp; Karen Howes; Richard Jones
Subject: Performance Meetings

Follow Up Flag: Follow up
Flag Status: Completed

Good morning all,

We are 3 months into the year, and it would have been expected that at least 1 supervision meeting had been held with employees with notes provided to HR, with the next scheduled for July.

To keep on track of these meetings, the following methods have been used;

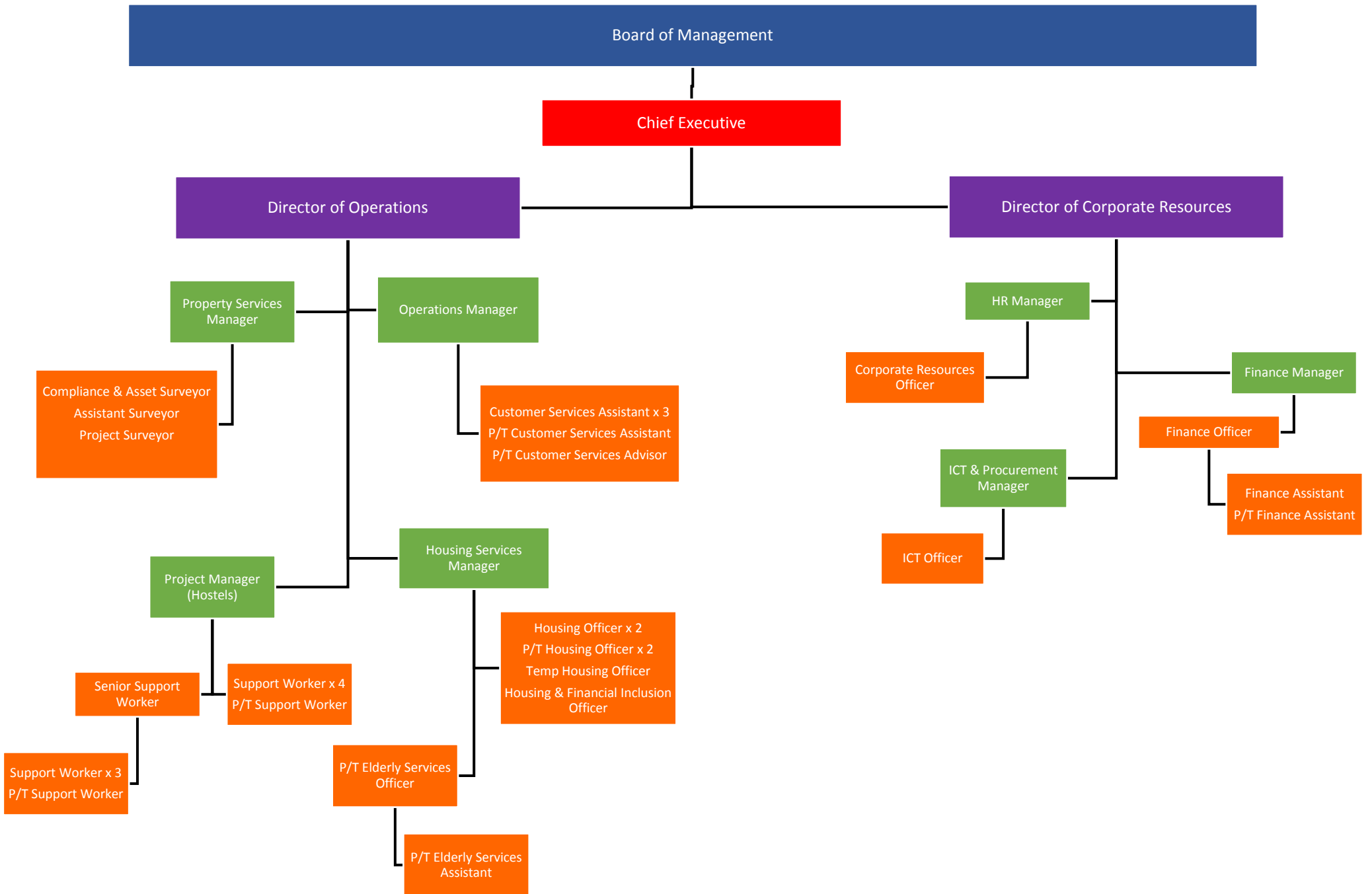
- Setting a scheduled event in calendar for every 8 weeks;
- Onus on employee to arrange the next meeting after the last has been held;
- Arranging your meetings following supervision with your manager.

This is not an exhaustive list, but please use an approach that is best used for you to ensure that these meetings are held every 8 weeks.

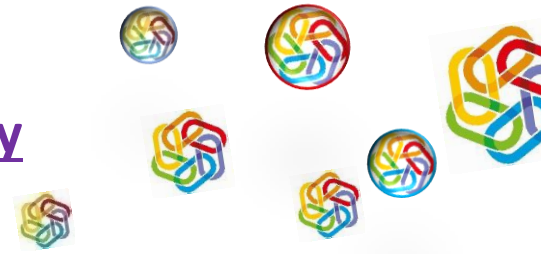
This is now being reported to Board on a quarterly basis with a narrative on our progress.

If you do have any concerns, please let me know.

Many thanks,
Lowri



Staff Benefits Summary



Working Hours:

34.5 hours a week standard contract hours
 Office hours 08:30 to 16:30 (16:00 Fridays)
 Time Off In Lieu (TOIL) system operated
 Flexible working policy

Sector norm stands at
37 hours a week (7% more)

Salary:

Benchmarked pay scales
 2% average annual cost of living increase
 Sick pay entitlement

**Bro Myrddin pay
 highest median salary
 in sector (2018)**

Leave entitlement:

30 days annual leave entitlement
 Office closed on bank holidays
 Extra days leave given Christmas and New Year
 Enhanced Maternity and Paternity entitlement

**Above the statutory
 28 days leave**

Pension:

Four Social Housing Pension Schemes are operated by the Association.
 Each scheme attracts different contributions as follows.

Scheme	Employer Contribution
Final Salary 1/60 th *	7.5%
Final Salary 1/80 th	5.2%
Career Average (CARE) 1/120 th	4.0%
Defined Contribution	3.0%
* Closed to new members	

Each pension scheme also attracts;

- Death in service cover
- Tax and national insurance savings (salary sacrifice)
- Ability to make Additional Voluntary Contributions

**Most have closed
 Final Salary pension
 scheme to new
 members and ceased
 accrual of existing
 members**

Travel and Expenses:

Reimbursed for expenditure incurred in the course of working.
 Essential Care User roles attract an annual car allowance of £963.
 Non-essential users can claim mileage far greater than HMRC tax free limits.

**Essential Car User allowances have been
 phased out in most places over recent years**

Costs around £170 per employee per annum (£6.5k in total)

Car Parking:

Free car parking for all

Learning & Development:

Average of 11 days training to each staff member 2017/18
Four companywide staff training days held each year
Career development opportunities sponsored
Professional membership subscription paid
Continual Professional Development supported

A total investment of around £1k per staff member

Health & Wellbeing:

Free eye tests
Discounted gym membership
Counselling Service
Annual health screening
Cycle to work scheme?
Wellbeing lunches etc
SimplyHealth (April 2019)



Other:

Free Tea, Coffee, water and kitchen facilities provided
Childcare vouchers
Organised social activities
Loyalty Awards
Volunteering
Dress down days
Reasonable use of Intranet
Additional hour for Christmas Shopping
Charity fundraising

Engaging and inclusive Culture

Strong Values and sense of purpose



Team briefing paper – October 2018

Housing Services

Internal Audit Review of Anti-Social Behaviour Management: TIAA undertook this audit on 26 September.

The draft report has been issued which gave substantial assurance.

Housing Officers: Sam Jones has returned from maternity leave to work part time from 1 October. Sam's working days will be Monday, Tuesday and Wednesday.

We have now created three Housing Officer areas of approximately 300 properties per area.

CRM has been updated and the revised areas circulated to the relevant staff.

The post of Housing and Financial Inclusion Officer has been advertised and interviews are taking place on 26 October.

Universal Credit: The countdown to full service has begun and the Welfare Reform Steering Group has compiled an action plan to help the Association prepare for the rollout starting in December 2018.

All frontline staff received training on 4 October and now have a greater understanding of the process of claiming UC etc.

This was facilitated by Swansea City Council where full service has been introduced since December 2017.

Migration from existing legacy benefits will not be completed until 2023.

Landlord Portal: We have been advised by the DWP that we scheduled to go live with the landlord portal on 7 November. Prior to that a learning and development teleconference will take place on 30 October.

We will also be given Trusted Partner status at the same time which means that we can apply for APAs without any queries from DWP.

Digital Engagement Training: This training was shared with Carmarthenshire County Council and facilitated by TPAS Cymru on 23 October. The training considered how to widen community and resident engagement using simple digital techniques.

It covered Facebook (adverts, posts, and videos), Twitter, video, and other community engagement tools.

Choice Based Lettings Scheme: The liaison group last met on 9 October. The procedure document has been further developed and a plan is being developed for the re-registration of all applicants.

Corporate Resources

Post Repair Surveys: A new system is being developed that will allow post repair surveys to be sent to Residents via an SMS message, to their phone. The survey will be in the form of a link that will then display the survey on their phone. When completed the survey will be returned to Customer Services. Go-live is scheduled for the 29th October 2018

Mobile Phones: All staff mobile phones have been replaced with the latest Huawei handsets, these managed handsets now also offer the latest in secured options including a custom “app-store” that is bespoke to Bro Myrddin.

QL Rent Accounting: The Association has acquired the latest module for the QL module which is “Predictive Arrears” reporting, this is a suite of reports which is based on our QL rent accounting data and is another tool to tailor and streamline the arrears process.

VfM Strategy: The Value for Money strategy has been reviewed and will be updated on the Intranet shortly

Contracts Register: Changes are underway to make the Contracts Register easier to update and to provide relevant alerts through a more automated approach, this will also provide options to record Community Benefits against contracts (and record their delivery).

Peoplesafe: The latest version of the Peoplesafe lone working app has been added to the new mobile phones, this includes a “Man down” feature and all users of this app are reminded that this should not be disabled or turned off.

CRM: QL system has been updated to record the new patches for the Housing Team, all reporting and CRM processes have now been updated to accommodate this change.

New Developments: Specifications for CCTV and “Guest Wi-Fi” at our developments have now been received and we will be working with the developers of the schemes to implement them.

Car Park: Due to the increase in the number of staff allocated to park in the Associations car park, there is even more limited spacing for residents and visitors. Therefore, staff who have a car parking card for St Catherine's Walk should be utilising these and only parking in the Associations car park for a maximum of 30 minutes.

Recruitment: Mental Health Support Workers: We are currently advertising for a number of support worker posts – either full time or part time. Closing date for applications is the 30th October 2018 and interviews taking place on 9th November 2018.

Work Experience: During the 29th October – 9th November 2018 Scott Wilson, via Coleg Sir Gâr will be joining us on work experience. Scott is keen to improve his IT skills and will be working with our IT team.

EMT Away Day: EMT will be out of the office on Thursday, 25th October 2018. The meeting will be held at the Botanical Gardens.

Volunteering: Whilst the organisation currently offers time off for staff to be involved in volunteering projects few people take this opportunity. Should you wish to participate please discuss with your line manager. In return of this opportunity we ask staff to write up their experience (including photograph) in the next edition of Sgwrs.

Working Together: We continue to provide opportunities for office-based staff to spend time working with field-based staff to improve understanding of the impact of their roles. Should anyone wish to participate in any visits/estate walkabouts please discuss with your line manager and notify the lead person. This may need to be considered on a formal basis as part of regular development activity.

Governance: Board Members: Following the Board of Management held in September we have appointed a co-opted Member to the Board – Paul Ryan.

Property and Customer Services

- UC:** Working closely with Housing Team to plan and support UC roll out.
- Be like Bob campaign on social media has been obtained and is being to be promoted over coming weeks. Help us get the messages out by sharing whenever you see our posts.
 - DWP UC explanation video's to be shared.
 - Digital drop in on 9th November being promoted in Sgwrs, on the presentation screen in reception, leaflets put in reception. To be shared on social media.
 - Article in Sgwrs and Quids in Article sent out on UC.

- Access to Bro Myrddin's social media is being expanded to include Customer services staff (Gemma, Rose and Llinos).
- UC claim checklist on the website has been updated.
- Updated article on UC on website (once translated).
- Working on 'on hold' message on telephone.
- Following the TPAS Digital engagement training the Customer Services Manager and the Housing Services Manager are going to be creating short videos for social media.

Call Standards: Call standards have been reviewed and approved. The main changes are relating to GDPR and apply to ALL staff handling telephone calls:

- **Outgoing Call Recording**

- When making an outgoing call to a resident/other contact, the CSA must inform the contact that the call is being recorded for training and monitoring purposes. The CSA should then ask the contact if they are happy to continue the telephone conversation.

- **Telephone Vetting (As per the Associations Procedure)**

"Verify someone's identity by asking for one of each of the following categories:

Category 1 (Name)

- Name – The resident or caller will need to give their full name.

Category 2 (Personal information)

- Address – The resident or caller can give their full address and postcode.
- Phone number – Resident or caller can give any phone number we have in their record.
- Date of Birth – Resident or caller can give their full date of birth.

Category 3 (Account information)

- Account Number – Bro Myrddin resident or caller can give their rent account number.
- Tenancy Reference Number – Resident may not know this, but if they do they can give their tenancy number.
- Payment method – Resident or caller can advise how they usually pay their rent (e.g. Direct Debit, full housing benefit, cash, etc.).
- Last Payment Amount – Resident or caller can tell you the value of their most recent payment.
- Last repair – Residents can tell you details of the most recent repair to their property.

If a caller is making an enquiry or telephones to discuss a tenancy matter on behalf of the resident, the CSA must check on CRM/Documotive to ensure that we have received written permission from the resident stating that they are authorising that person to contact us on their behalf."

- **Lock changes**

When a lock change is requested by a resident, the Customer Assistants must comply with the Data Protection security questions to establish the ID of the resident before requesting the lock change.

Language line: Bro Myrddin over the next few weeks will be joining language line.

This will give us access to professionally vetted and checked interpreter in over 200 languages, 24 hours a day, 365 days of the year all through the use of any telephone.

LanguageLine Solutions (LLS) operates the world's largest telephone interpreting service, servicing 100,000 calls every day for emergency services, health, commercial, government and welfare bodies.

You'll be able to arrange translation services from the office or in a residents home, over the phone via a 3 way call or in a meeting room with the interpreter on loud speaker. Via this service you can also arrange for a message to be passed to a resident in their own language, i.e. a telephone call to say the contractor will be with you at 3 p.m. today.

More information on how to access the service will be circulated soon.

Strategies, Policies and Procedures:

- Communications Strategy
- Complaints Strategy
- Asbestos Management Strategy
- Our Complaints Satisfaction Survey has been reviewed and will be issued to all Complainants of 17/18 by the end of this month. This is in line with the recommendation made by Scrutiny.

Hanover Court: The tree works at Hanover Court have now been completed, there was close liaison with the neighbouring private properties and the works were successfully undertaken without any issues. The contractor concerned has provided a bespoke bench for the resident's at the scheme as part of the community benefits requirement.

Kitchen and Bathroom Replacement Works: The kitchen and bathroom programme has now started, we will be replacing 37 kitchens

and 21 bathrooms, with the successful contractor, Property Building Maintenance. We have completed 7 kitchens and 14 bathrooms to date.

We have also received the tender submissions for the electrical heating programme, 20 properties will be completed this year. We have specified a different type of Quantum heater this year and have managed to reduce the tender value by £25k compared to last year's costs.

Cyclical Painting Programme: We have 44 properties identified in this year's cyclical painting programme, Ian Williams are currently compiling the programme and should be starting work soon.

The scheme addresses being worked on are:-

- Allt Y Gog
- Clos Sticle
- Maes Dewi
- Woodlands Close
- Butchers Arms Court

Electrical Safety Policy: Property Services have introduced a new Electrical Safety Policy which will be made available (if it's not already) on the intranet. We just wanted to draw your attention to the following section of the policy around staff responsibility:

"7.6 All staff

Front line staff who visit residents' homes have a responsibility to ensure they look out for all potential Health and Safety issues. Specifically, in relation to Electrical Safety staff should look out for:

- Loose, badly fitting, cracked or broken sockets or switches.
- Sockets fitted above heat sources (such as above a cooker) or immediately next to a water supply.
- Electrical work carried out by a resident. i.e. additional cables entering a distribution board or meter cupboard, or unboxed/trailing cables.
- Tampering with or bypassing electric meters:
 - Damaged casing - the meter may be smashed, broken or removed completely and the cables disconnected.
 - Extra wires - wires sticking out or wrapped around connector clips attaching them to the meter.
 - Melted meter - parts of the plastic casing melted or scorch and burn marks on the meter.
 - Working but no credit - meter shows credit has run out but electricity is still available.
 - Meter dials not moving - dials on the meter aren't going around even when electricity is being used.
 - Burning smell - a smell of something burning or even smoke or sparks near the meter box.

- Residents appliances and electrical equipment:
 - damage to the cable coverings (with the exception of light scuffing), or non-standard repairs e.g. cables wrapped with electrical tape.
 - the cable is attached securely to the plug.
 - internal wires, those covered by the outer sheath are not exposed.
 - for damage to the plug, such as the cracked casing, bent pins, evidence of overheating i.e. burn marks or discoloration.
 - for signs of damage to the outer cover of the equipment or obvious loose parts or screws.

Where any of the above issues are identified staff should deal with it appropriately, i.e. raise an order where it is the Associations responsibility or discuss with the resident, record that discussion in CRM and arrange for the appropriate department to put the concern in writing and follow up."

Priory Street (37 units - 10 houses, 27 flats): Works have commenced on site. Archaeological investigations have completed and foundation works are underway. Works are progressing well and completion is still scheduled for 28th February 2020.

Gate Road, Penygroes (8 units - 8 houses): The outstanding planning matter relating to the relocation of a hedgerow has been dealt with and the works are now progressing well. Due to the planning delay the revised anticipated completion now August 2019.

Maes y Bryn, Llangennech (34 units - 26 houses, 8 flats): Completion date set as 28th September 2019. Works on site are progressing well.

Cwmgwili (10 units): Working towards entering into a contract for 10 houses with the Developer – package deal. Anticipated contract commencement date January 2019.

Purchase of existing properties: Board have now approved that we purchase 6 properties this financial year (2018/19). Contracts have been exchanged for two - 5 Heol Beca & 8 Bryn Gorwel, both Carmarthen. We are in the process of purchasing a further two (5 Cae Grug & 11 Cae Eithin). We still need to seek further suitable properties.

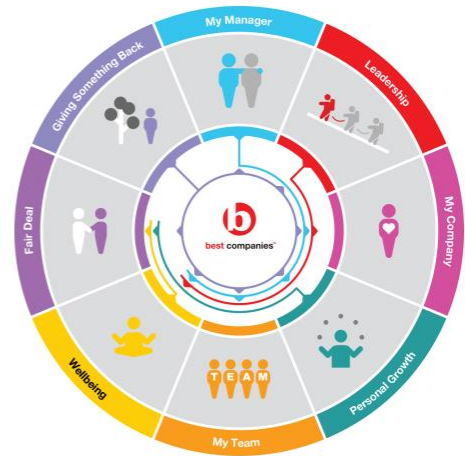
Glannant House refurbishment: Contracts signed with T Richard Jones with contract commencement dates of 6th and 20th of August 2018 and completion date set as 7th June 2019. Works are progressing well and currently well ahead of programme.

103 Brynyfryd, Llangennech: Planning and Building Regulations applications have been submitted and tenders are due to be issued shortly for an adaptation extension to 103 Brynhyfryd. Works anticipated to complete April 2019.

The 8 factors of workplace engagement

The academically tested and verified methodology we've built is one of a kind, and feeds our 8 factors of workplace engagement.

We break down your survey results to reflect how your organisation performs across the following eight factors, giving you the ability to target specific areas for improvement.



AGENDA

Management Team Meeting

Date: 24 March 2019
Time: 10:00 – 16:00
Venue: Plas Myrddin - Board Room
Attendees:

Agenda no. # EMTP 19	Agenda item	Resp. Person
39	Discuss and Approve Minutes of the previous meeting including Matters Arising	ALL
40	Review progress on corporate priorities/projects/best practice	ALL
41	Review Actions from Internal Audit	ALL
42	Review Risk Management Framework and Assurances (live from staff portal)	ALL
43	Receive Financial Performance (verbal)	FM
44	Discuss Health, Safety and Wellbeing matters a) Matters Arising b) Lone working c) Insurance Update d) Fire Safety e) H&S Action Plan – no actions f) Near miss / Accidents – none. g) Accident Reporting Form and Procedure	ALL
45	Discuss Data Protection matters a) General Update b) Data Sharing Agreements	ALL
46	Discuss Equality and Diversity matters a) QED Award	ALL
47	Discuss Employee Engagement	
48	Any other business	ALL
Date of next meeting		TBC

Management Meeting Minutes

Attendees
Apologies



Meeting date	Agenda	Agenda item.	Meeting notes	Actions	Resp. Person	Target Date	Comp. Date	Comments
23/07/2019	37	Comms	Managers were asked to share ideas on how the association can progress with communicating effectively with staff. Clear that communication was a continuous arising theme. Consideration needs to be given to what staff need to know and what will motivate them in their role. Main priority is that all staff receive information at the same time. Clear that the association realise that staff also need to take ownership and that they're doing the best they can.	Managers to take the lead in arranging their monthly team meetings. Doesn't have to follow agenda i.e. training, de-briefing, asking for feedback.	Managers	Ongoing		
				Following quarterly performance measures report meeting, this feedback to be passed back down to employees at next team meeting.	Managers	Ongoing		
				Managers to monitor concerns and negative comments from employees on a daily basis and deal with informally as soon as possible.	Managers	Ongoing		
23/07/2019	37	Frequency of meetings	Managers were asked to share their ideas on frequency and length of meetings	Meetings to be added to a calendar of events and held every month.	HRM	30/09/2019		Will be submitted to EMT for approval. Shared with Managers at the meeting in April .



Executive Management Team Meeting held on 25 April 2019 at 10:00 (board room)

Present: (CEO) (HPCS)
(DoCR) (HRM)

M I N U T E S

Agenda No.	Agenda Item	Action
24 EMT 19	<u>Communication</u> <u>Feedback from new Management Meetings</u> A lengthy discussion was held regarding the new set up of management meetings. Previously, they were only held every three months, but senior managers agreed that management need to take more responsibility in discussing current priorities and sharing ideas. Both the DoCR and DoOp agreed that there were different lines of communication between departments, with Corporate Resources having more structured table discussions with their teams and employees. This information has been shared via performance meetings. It was agreed that this be reviewed with Managers at their next meeting in May 2019, with it being highlighted that it is their responsibility to communicate information to their employees. i.e. team meetings, email, briefing.	EMT

Lowri Davies

From: Lowri Davies
Sent: 26 September 2019, 14:44
To: Lowri Davies
Subject: BMHA: Resident Engagement Survey

Dear all,

As a small organisation, you, our employees are our best asset in achieving our corporate goals and succeeding as a business.

To ensure that we are doing as much as we can for you, keeping you happy, motivated and productive in the workplace we want your feedback.

As a starting to point, we will be conducting an all staff Employee Engagement Survey. This will also be able to feed in our new Health and Wellbeing Strategy.

The details are currently being finalised and further information is to follow from Lowri Davies but you will be kept fully informed and have plenty of time to complete.

If you have any concerns, please do not hesitate to ask us.

Many thanks,

TUESDAY

15

**Health and Wellbeing Task & Finish Group
Boardroom**

DATA PROTECTION GROUP

AGENDA

Attendees

RJ – Data Protection Officer

RL – HR Representative

TR – Senior Management Representative

CJ – Management Representative

MA – ICT Support

DG – Employee Champion

Item No.	Item details
1	Welcome & Apologies
2	General update (including from DPIGW meeting)
3	Review Actions Register LINK TO ACTIONS REGISTER
4	Review Data Impact Assessments – SEE FILE ➤ Cascade Go ➤ Resident app ➤ etc
5	Data Sharing Agreements
6	Data Retention
7	Data Breaches
8	Subject Access Requests
	Any Other Business ➤ Arawak training portal
	The Right Stuff review – People, Time, Reasons, Things & Way
	Date of next meeting TBC