CIPD Candidate evidence matrix

(CEM1)

Candidate name: Carla Roberts				**CIPD Membership/registration No.:** 53274210		
Qualification title: CIPD Level 5 Diploma in Applied HR				**Unique Learner No. (ULN): 1810259**		
Unit code	**Unit title**	**Assessment criteria no.**	**Evidence description**	**Evidence reference number**	**Assessor initials**	**I/V initials if sampled**
5ADCM	Contributing to Coaching and Mentoring	1.1	Email organising external coaching sessions	EV01		
5ADCM	Contributing to Coaching and Mentoring	1.1, 1.3, 2.3	Content for Coaching training	EV02		
5ADCM	Contributing to Coaching and Mentoring	1.1	2 week review form (inc. Buddy identification)	EV03		
5ADCM	Contributing to Coaching and Mentoring	1.1, 1.3	Meeting notes showing coaching on how to manage staff issues	EV04		
5ADCM	Contributing to Coaching and Mentoring	1.2	Email showing how a manager dealt with meeting without HR present	EV05		
5ADCM	Contributing to Coaching and Mentoring	1.3	Time Out Handout showing Bluestone's culture	EV06		
5ADCM	Contributing to Coaching and Mentoring	1.3	Survey results	EV07		
5ADCM	Contributing to Coaching and Mentoring	1.3	Organisational structure	EV08		
5ADCM	Contributing to Coaching and Mentoring	1.3	Departmental structure	EV09		
5ADCM	Contributing to Coaching and Mentoring	2.1	Success story email	EV11		

5ADCM	Contributing to Coaching and Mentoring	2.1	Success story within staff newsletter	EV12		
5ADCM	Contributing to Coaching and Mentoring	2.1	Coaching champions initial email	EV13		
5ADCM	Contributing to Coaching and Mentoring	2.1	Coaching champions email – setting it up	EV14		
5ADCM	Contributing to Coaching and Mentoring	2.1, 2.4	Coaching benefits poster	EV15		
5ADCM	Contributing to Coaching and Mentoring	2.2, 2.4	Coaching and mentoring policy	EV16		
5ADCM	Contributing to Coaching and Mentoring	2.2	Feedback from Head of L&D re. CM policy	EV17		
5ADCM	Contributing to Coaching and Mentoring	2.2, 2.4	Email to managers regarding appraisals followed by coaching	EV18		
5ADCM	Contributing to Coaching and Mentoring	2.3	Email to encourage managers to attend coaching training	EV19		
5ADCM	Contributing to Coaching and Mentoring	2.3	Coaching guidance – introduction for managers	EV10		
5ADCM	Contributing to Coaching and Mentoring	2.3	Email regarding external coaching training	EV20		
5ADCM	Contributing to Coaching and Mentoring	2.3, 2.4	Mentoring guidance for buddies	EV22		
5ADCM	Contributing to Coaching and Mentoring	2.4	Email reminding managers to assign new starters a buddy	EV21		
5ADCM	Contributing to Coaching and Mentoring	2.5	Meeting notes regarding evaluating the coaching and mentoring process	EV23		
Candidate declaration:						

• I confirm that the work/evidence presented for assessment is my own unaided work. • I have read the assessment regulations and understand that if I am found to have 'copied' from published work without acknowledgement, or from other candidate's work, this may be regarded as plagiarism which is an offence against the assessment regulations and leads to failure in the relevant unit and formal disciplinary action. • I agree to this work being subjected to scrutiny by textual analysis software if required. • I understand that my work may be used for future academic/quality assurance purposes in accordance with the provisions of the Data Protection Act 1998. • I understand that the work/evidence submitted for assessment may not be returned to me and that I have retained a copy for my records. • I understand that until such time as the assessment grade has been ratified through internal and external quality assurance processes it is not final.			
Signature:		**Date:**	**09/03/2020**

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.

Qualification: CIPD Diploma in Applied Human Resources

Module Name: 5ADCM Contributing to Coaching and Mentoring

Assessment: Portfolio of Evidence

Word Count: 2976

Student Name: Carla Roberts

Student Number: 1810259

CIPD Membership Number: 53274210

LO1: Be able to assess the impact of coaching and mentoring activity within an organisation and make recommendations for further development.

Personal Statement

1.1. Investigate the extent to which coaching and mentoring take place within an organisation.

Coaching and mentoring are popular ways of businesses responding to employee needs and growth, through the form of directive and non-directive forms of development (CIPD, 2019). The learning and development of Bluestone employees takes place through using coaching and mentoring, as well as other learning initiatives such as training, reducing stress and creating positive work-life balance opportunities (Starr, 2011).

Bluestone's coaching and mentoring initiatives are currently being developed, with coaching taking place for directors and 'Heads of Departments' followed by this level of managers receiving training on how to coach others. The organisation of each coaching session was organised through myself liaising with the external coach (EV01). External coaches can open up new ways of thinking and is more detached from company culture (Clutterbuck 2012). They are also highly skilled in the area of coaching so will be more likely to achieve positive results. However, in 2019 a need was identified to provide training for internal managers to be able to coach. The training was delivered by an external training provider who had been working with the Learning and Development team for a number of years. EV02 shows the content of the training and the content of the previous training session. This therefore provided senior managers with an understanding of the definitions of coaching, directive and non-directive forms of coaching, and how to choose the best approach.

Mentoring also exists within the organisation, sometimes formally and sometimes informally. CIPD (2019) note that mentoring is useful for a specific task or when individuals can learn from each other. Therefore, it is often used during the induction process for new starters. Bluestone have used a buddy system for new starters in the past, which is shown on part of a 2 week review form (EV03). This form encourages managers to assign the new starter a 'buddy', and also makes sure that they have a 'meet and greet' with their new buddy on their first day. On a less formal basis, employees are encouraged to ask their peers for help, and will receive information and knowledge from their superiors. This enables employees to gain essential knowledge to be able to carry out their roles.

The culture of Bluestone is to be 'people centric', which therefore allows a coaching culture as the company looks to grow and develop their employees. Within day-to-day tasks, employees coach and mentor each other through guidance on certain matters and within informal training. An example of this is through weekly meetings between HR and one of the largest departments that have the most staff issues; the HR team coach the managers by making recommendations on how to approach these situations, with the manager ultimately making the decisions (EV04).

1.2. Evaluate how current coaching and mentoring activity supports achievement of individual, team and organisational objectives.

It is very well implementing coaching and mentoring in the organisation, but it must be followed up on to have an overall effect on the individuals and the organisation. CIPD (2013) state that organisations need to learn from the coaching conversations that take place. Coaching requires support and should enable behaviours and culture to change. Through the formal coaching

processes that existed within Bluestone, there was a lack of evaluation and it was not evident that it transitioned from the coachees into the rest of the team. The training delivered for senior managers about how to coach also didn't emphasise the important of following up on the coaching and therefore the effectiveness of the coaching programme could be lost.

The informal coaching and the mentoring that takes place have a direct impact on individual and organisational objectives. The HR team are constantly under pressure due to the small team dealing with a large number of staff. Therefore, one of HR's objectives was to empower managers to take ownership of their staff issues; for example, disciplinary and probation meetings. EV05 shows an example of when the managers held a meeting without HR being present, showing they had learnt the process successfully through coaching and mentoring.

1.3. Assess factors in the organisation including other learning strategies which could impact on the further development of coaching and mentoring.

Due to coaching and mentoring being limited within Bluestone, there is scope to implement more initiatives to help improve performance. However, there are also barriers to implementing these initiatives.

The organisation must recognise the culture within the organisation to determine whether coaching would align with the overall business culture and objectives (CIPD, 2017). Bluestone has a positive culture which is 'people-centric'; the organisation operates on the 3 Ps (people, product, profit) and being people-centric means that people come first in this operation (EV06). Therefore, this should enable coaching and mentoring to be implemented into the workplace. This would therefore need to be considered to determine how effective the implementation of coaching would be (CIPD, 2019a). However, recent survey results demonstrate that Bluestone don't always put people before product (EV07). Therefore, this must be engrained fully in the culture in order to implement further coaching and mentoring strategies.

Bluestone has a tall hierarchical structure overall (EV08), although several individual departments have slightly flatter structures (EV09). This has an impact on the level of trust between managers and employees. It is important that a coaching environment has a high level of trust (Downey, 2014) which is sometimes difficult to build within an environment which is bureaucratic. Therefore, coaching could work well in departments with high trust and low power, whereas in departments with low trust and high power it would be more difficult to implement.

Bluestone is a growing organisation that is expanding through an increase in products, services, investments and employees. Coaching could therefore support the implementation of these initiatives through providing employees and managers with the tools to be able to drive new ideas forward. However, efficiencies are often made to save costs so that this money can be reinvested into the new initiatives. This can hinder the ability to form a coaching culture as trust can be difficult to maintain and focuses are elsewhere.

There has currently been training given to the Heads of Department to enable them to be coaches (EV02). Therefore, current L&D initiatives are helping to implement a coaching culture within the organisation. However, there is still a long way to go to enable the new coaches to effectively coach. The training provided isn't a formal qualification and has so far consisted of two days training, so

further development is required to help support the new coaches. The coaches will also have to have availability to coach, which is often difficult at Bluestone as all managers are under pressure with added workloads due to expansion. For example, due to the increased staffing levels managers are spending their time undertaking recruitment, training and employee relations issues. For mentoring and informal coaching there is more scope for this to be implemented. This is because mentoring easily aligns with other day-to-day tasks which are needed. For example, mentoring can exist from peer-to-peer without the need for any training. Informal coaching can exist through conversations that regularly happen in the workplace; for example, HR coaching a department on the best ways of dealing with employee relations problems (EV04).

To further develop coaching and mentoring in the workplace there can be considerable costs associated. CIPD (2019b) note that the organisation should weigh everything up based on the business benefits, costs and nature of the L&D function. This often determines the type of coaching programme an organisation will use; such as whether to use internal or external coaches. Coaching can have a direct cost if an organisation is using an external coach as they have high daily rates. However, internal coaches can have indirect costs such as time and payroll costs.

1.4. Make justified recommendations for how coaching and mentoring activity can be developed to benefit the organisation.

From assessing the current coaching and mentoring activities, I believe that improvements can be implemented to strengthen the process so that the outcomes are more effective.

Currently, Heads of Department have received training on coaching. However, this could be expanded to include middle and junior managers; this would be beneficial as supervisors could then be coached on how to progress into managerial roles. The difficulty in this would be the time taken to train this level, as they are the most stressed due to their increased workload (CIPD, 2018). Therefore, I would recommend that they are sent short snippets of information via email and short training courses are delivered over several months to give everyone an opportunity to attend.

To understand the impact of coaching and mentoring initiatives, there should be an evaluation process (Forbes, 2017). Therefore, it would be beneficial for the Learning and Development team to meet with coaches and coachees, retrospectively, to discuss how it has had a positive effect and how it can be improved. This will strengthen the process so that improvements can be made and to assess how successful the implementation of coaching and mentoring has been.

To raise awareness of coaching initiatives and for employees to be on-board with initiatives, success stories could identified through evaluating the coaching process then shared with the wider business. This could be included within the fortnightly newsletter which all employees receive. As another way of raising awareness and gaining 'buy-in' from other employees and managers, a group of coaching champions could be created (Clutterbuck and Megginson, 2005).

As part of the appraisal process, coaching could be implemented into personal development plans as a follow up to the appraisal. This would then involve the line manager as the coach, which has both benefits and drawbacks. For example, the supportive relationship can lead to open communication between managers and employees, and therefore can increase creativity and willingness to put ideas forward. However, Downey (2003) expresses the difficulties raised when the line-manager is

the coach, as trust can be difficult to build within a power-led environment. Therefore, coaching undertaken as a follow-up to appraisals should consider the environment in which the coach and coachee are in.

Another recommendation could be to formalise coaching into a policy. Currently, coaching is very ad-hoc and done on an informal basis. Therefore, a process could be put in place and included within the Learning and Development policy or an individual policy. This would give managers and employees clarity of Bluestone's stance on coaching and mentoring and would provide tools and resources to enable coaching and mentoring; there could be a flow chart on the coaching process including evaluating the coaching.

From implementing these recommendations I believe it would strengthen the coaching and mentoring within Bluestone and could lead to increased individual, team and organisational performance.

Reference List for LO1:

CIPD (2013). *Is coaching actually solving problems for organisations?* [online] Available at: https://www.cipd.co.uk/podcasts/is-coaching-solving-problems-for-organisations. [Accessed 29 February 2020].

CIPD (2017). *Coaching: It's a culture thing.* [online] Available at: https://www.cipd.co.uk/podcasts/coaching-culture. [Accessed 01 March 2020].

CIPD (2018). *Health and well-being: middle managers feel the squeeze.* [online] Available at: https://www.cipd.co.uk/Community/blogs/b/research-blog/posts/health-and-well-being-middle-managers-feel-the-squeeze. [Accessed 04 March 2020].

CIPD (2019a). *Coaching and mentoring.* [online] Available at: https://www.cipd.co.uk/knowledge/fundamentals/people/development/coaching-mentoring-factsheet. [Accessed 01 March 2020].

CIPD (2019b). *Costing and benchmarking learning and development.* [online] Available at: https://www.cipd.co.uk/knowledge/strategy/development/benchmarking-factsheet. [Accessed 02 March 2020]

CLUTTERBUCK, D. (2012) *Why line manager coaching often doesn't work and what to do about it.* [online] Available at: https://www.davidclutterbuckpartnership.com/why-line-manager-coaching-often-doesnt-work-and-what-to-do-about-it/. [Accessed 19 January 2020].

CLUTTERBUCK, D. and MEGGINSON, D. (2005). *Making coaching work: creating a coaching culture.* CIPD: London.

DOWNEY, M. (2014) Effective modern coaching: the principles and art of successful business coaching. London: LID.

FORBES. (2017). *The success and failure of the coaching industry.* [online] Available at: https://www.forbes.com/sites/forbescoachescouncil/2017/10/05/the-success-and-failure-of-the-coaching-industry/#341aaa06765f. [Accessed 17 January 2020].

STARR, J. (2011). *The coaching manual: The definitive guide to the process, principles and skills of personal coaching.* 3rd ed. London: Pearson.

LO2: Be able to support the implementation of coaching and/or mentoring programmes within an organisation.

Personal Statement

2.1. Promote the benefits of coaching/mentoring within the organisation, recognising and addressing the potential barriers.

For employees to be enthusiastic about coaching and mentoring, it is important to promote the benefits. One of the best ways of recommending something is using a case study; therefore I suggested using one of our senior managers' stories as way of promoting mentoring (EV11). The story was then published within the comms brief, which is a fortnightly newsletter sent to all employees (EV12). The story didn't focus on the actual impact of coaching and mentoring as much as I hoped, but it did highlight that mentoring from a director had helped an employee grow and progress into a senior manager. Therefore, I believe more success stories should be published to Bluestone employees, to promote coaching and mentoring in the workplace.

Another way of promoting coaching and mentoring is to create a group of coaching champions (Clutterbuck and Megginson, 2005). EV13 shows notes from a meeting between myself and the Head of Learning and Development, where we decide who will be asked to be coaching champions. EV14 shows an email chain where I set up the coaching champion action group. This included employees at all levels, from senior managers to assistants. Although the first meeting is yet to occur, I received a positive response from those selected to be involved.

Although the responsibility of promoting coaching will be with the champion group going forward, I sent out a poster (EV15) to promote the benefits of coaching. This was aimed at coachees and mentees so they would feel encouraged to sign up to coaching and mentoring. This was sent out via Flow, our L&D platform, to all employees. Therefore, this should encourage participation in coaching and mentoring activities.

2.2. Contribute to the development of organisational coaching/mentoring processes.

Although Bluestone has coaching and mentoring in place, the process is fairly informal and ad-hoc; therefore it needed to made into a formal process. As Bluestone is trying to limit the amount of policies it has, I suggested that it was added to an overall Learning and Development policy. EV16 shows the coaching and mentoring policy I wrote, with EV17 showing the feedback from the Head of Learning and Development. This policy includes a brief introduction into why coaching and mentoring exists at Bluestone, with a breakdown of the different processes; this includes the buddy system, line manager mentoring, peer mentoring, personal development plans, coaching champions and opportunities for coaching training. Once finalised, the Learning and Development policy will be sent out on the online L&D platform, which goes to all employees, as well as being added to the resource centre on the intranet.

The Head of Learning and Development and I have recently included coaching into the appraisal process. All appraisals are now to be followed by coaching, so that managers and supervisors can help employees achieve the objectives agreed within the appraisal. This can be coaching from them directly, or it could be organised with another coach or a mentor. EV18 shows an email I sent to managers advising them of this. This aims to increase the amount of coaching that happens at Bluestone and will hopefully increase performance and engagement.

2.3. Support coaches/mentors to build and develop the knowledge, skills and behaviours required for the role.

Coaches and mentors will require training on how to coach as they will need to understand the process, the models and theories, the impact and issues such as confidentiality and data protection. Therefore, training was organised for Heads of Department who will be the first group of people to become official coaches; EV02 shows the content of this training. However for coaching to become company-wide, other managers and supervisors need to be coached and trained; so an email was sent to encourage them to book onto the next scheduled sessions (EV19).

It was decided that managers will receive brief guidance documents until they have received the classroom-based training. EV10 shows the first guidance document that was sent out, which was a brief introduction to what coaching is. However, this will need to be followed with further guidance enabling managers to gain coaching skills. The two day course is facilitated by Dawn, a consultant who has worked with Bluestone for almost two years and is a fully qualified coach.

In addition to the two-day course, it is beneficial for some managers to attend an accredited course which is slightly more in-depth. Therefore, Heads of Department were sent an email (EV20) with information about an external training course which would enable them to gain a Level 5 Certificate in Coaching and Mentoring in Management. This would be at a cost to Bluestone but would be beneficial in terms of return on investment.

Although being a 'buddy' does not require formal training, it is important that these mentors understand their role and why it is important. EV22 is a poster I created for buddies to understand their role, and to encourage more people to become buddies.

2.4. Assist potential coachees/mentees to understand and participate fully in coaching/mentoring programmes.

For coaching and mentoring to exist in the workplace employees need to be encouraged and supported. EV15 shows the poster I created and sent to all employees on some of the benefits of coaching, and how to be involved in the process. This highlighted who coaching and mentoring is for, when it happens (i.e. it takes place within work time and is therefore they are paid during this time), what coaching and mentoring is, and the benefits.

EV18 is an email to managers instructing them to include coaching as part of their employees' appraisals and personal development plans. This ensures that all employees receive a form of coaching, even if it's not through signing up to the more formal route.

New starters will also be assigned a buddy, which is included in the coaching and mentoring policy (EV16). This aims to encourage employees to be involved in coaching and mentoring as soon as they

commence employment. EV21 is an email sent out to remind managers to assign new starters with a buddy, with EV22 being the poster I created for 'buddies'.

2.5. Support the on-going evaluation and continuous improvement of the organisation's coaching/mentoring programmes.

Forbes (2017) suggests that to understand the impact of coaching and mentoring initiatives, there should be an evaluation process. I met with the Head of Learning and Development, as well as the HR Manager, to discuss how we can evaluate the effectiveness of the coaching and mentoring process once it has been fully implemented (EV23). This will include evaluating both internal and external training.

As the coaching and mentoring programme is in the early stages of being improved and developed, there is little evaluation into existing processes. Therefore, going forward it will be essential to evaluate the process and make continuous improvements. From undertaking an initial investigation into the extent to which coaching and mentoring take place at Bluestone, and identifying recommendations, the improvements I have identified have begun being implemented alongside the Learning and Development team. We will therefore continue to monitor, evaluate and improve this new process so that it can be effective and have positive impacts on the individuals, teams and organisation.

Reference List for LO2:

CLUTTERBUCK, D. and MEGGINSON, D. (2005). *Making coaching work: creating a coaching culture.* CIPD: London.

FORBES. (2017). *The success and failure of the coaching industry.* [online] Available at: https://www.forbes.com/sites/forbescoachescouncil/2017/10/05/the-success-and-failure-of-the-coaching-industry/#341aaa06765f. [Accessed 17 January 2020].

EV01 - pg 1

From: Carla Roberts
Sent: 31 January 2020 16:55
To: Carla Roberts
Subject: RE: Beverley - Coaching sessions

From: Debbie Rainbow [mailto:drainbow@bluestonewales.com]
Sent: 08 March 2016 14:44
To: Beverley Bradley
Cc: Emma Smith
Subject: RE: William ECR

Hi Beverley

If you forward to me in the first instance and I will ask Carla to liaise with managers and arrange dates in diaries.

Trust that is acceptable.

Kind regards

Debbie Rainbow MSc
Director of Human Resources and Health & Safety
T: +44 (0) 1834 869900 ext 525
Mobile 07771 806730

Bluestone Resorts Ltd,
Canaston Bridge,
Narberth,
Pembrokeshire,
SA67 8DE
www.bluestonewales.com

From: Beverley Bradley [mailto:bb@bradleylongworth.com]
Sent: 08 March 2016 10:50
To: Debbie Rainbow
Cc: Emma Smith
Subject: RE: William ECR

Hello Debbie
I understand from William that for the future it would be better for me to liaise with yourself regarding dates for my visits, instead of via Emma; the obvious advantage being that you will be "in the loop" vis-a-vis my Coaching sessions/activity. Do you want me to send you through my proposed dates and suggestions of who I would be seeing on these visits?

If you are happy with this, obviously I appreciate you might want to give it some thought as to who in your office would be involved in the liaison with the managers to match them to the meeting dates and times etc, if you could let me know your thoughts that would be helpful.

Many thanks.

Regards
Beverley
Beverley Bradley FCIPD
Director – Bradley Longworth

07885 175769 (mobile) 0118 983 5687 (home office)

E-mail. bb@bradleylongworth.com
www.bradleylongworth.com

From: Debbie Rainbow [mailto:drainbow@bluestonewales.com]
Sent: 04 March 2016 10:13
To: Beverley Bradley
Cc: Emma Smith
Subject: William ECR

Hi Beverley

It was good to catch up last week and have a bit more clarity about the coaching sessions and agree how we are going to work together collaboratively. I look forward to our next catch up.

Attached are William's ECR reports (Multi-rater and self rated). William has committed to putting together an action plan following his feedback and I know he discussed the key areas with you in his coaching session.

Regards
Debbie

Agenda

- Reflections from last time
- Workplace observation
- Coaching defined
- Directive and non directive coaching
- Choosing the most effective approach

EVO2 - pg 2

Last Module

- Understanding Individual Development Needs
- Addressing Individual Development Needs
  - Coaching Spectrum
  - Skills Transfer Process

EV03

F&B Assistant Induction and Probation (Example)

Name:	Commencing Date:
Line Manager and Unit:	Mentor/Buddy:



Review Date:	Reviewer:
Training Completed (as highlighted above, including date):	
Competencies Identified (as per Performance Development Criteria):	
Additional Development Needed (at this stage):	
Successful Completion: Y/N	
Signed Reviewer: Signed Employee:	

EV04

Meeting notes (HSK/HR catch up) – Tuesday 18th February

DD: We've got an issue with a member of staff at the moment who is under-performing

CR: Ok, in what sense?

DD: She sometimes clean her lodges to a high standard then other days it dips, sometimes she goes weeks with having issues then she goes back to missing loads and the supervisor has to re-clean

CR: How has it been addressed so far?

DD: We've done obs notes with her

CR: Have you dealt with a similar situation before?

DD: Yes earlier this year

CR: What did you do then?

DD: We put her onto a PIP for one month

CR: Did that work?

DD: It did, but she then got worse again not long after we ended the PIP

CR: Would you go down the PIP route again for this person?

DD: Possibly, but they might dip again

CR: Ok so how could you keep it consistent this time?

DD: Can we do the PIP for 3 months instead of 1?

CR: Yes as long as she's aware how long it's for

DD: Then we can do obs notes every week and meet with her fortnightly to review how she's doing

CR: Sounds great

DD: What do I do if she doesn't do well?

CR: It would lead to a capability meeting

DD: Ok, are you happy to take notes if we meet with her on Friday?

CR: Yes that's fine, I'll put it in the calendar. Will you be able to create the PIP ready for that meeting?

DD: Yep I've got a template from last time so I'll adapt that one

CR: Great.

DD: Thank you.

EVOS

From:	Carla Roberts
Sent:	09 March 2020 17:37
To:	Carla Roberts
Subject:	FW: AW Meeting
Attachments:	Alex Willey Probation Meeting Notes.pdf

From: Sheonagh Blackadder
Sent: 03 February 2020 17:35
To: Carla Roberts
Subject: AW Meeting

Hi Carla,

Please see the attached notes from Alex's meeting today. We failed his probation so I advised him of his week's notice pay and right to appeal. Can you do the outcome letter? I will complete the leaver form on CRM now.

Thanks.

Kind Regards,

Sheonagh Blackadder

Housekeeping Operations Manager

Bluestone National Park Resort

Tel: 01834 869900 ext. 580

Web: www.bluestonewales.com

EV06

Time Out with William

Bluestone National Park Resort

Company Core Values



Culture

Our Culture is the most important road map of all and is the way that we must conduct ourselves at all times.

Believe it. Breathe it. Live it.

How We Operate

- We aspire to excellence, are open, honest and consistent in our actions and we achieve this through the inclusion of our people together with focused leadership and ownership of our challenges.
- We demonstrate genuine concern for people. We acknowledge effort with positive feedback and behave respectfully and responsibly in our interactions. We are forward thinking, decisive, innovative and have a positive 'can do' attitude.
- We believe in our company.

EVO7

December Pulse Survey 2019

Executive Summary

Headline Results

- We achieved a 78.4% response rate for this survey (564/719) compared to 77.6% response rate last August (593/736) – an increase of 0.8% in response rate but 29 fewer responses.
- Overall recommendation as a place to work is 25.2%, a decrease from last August's score of 30.2% (Annual Survey in December 2018 was 27%)
- 89.7% (504/564) have received the right training to carry out their role
- 91.4% (516/562) know where to find information about vacancies within the business
- 35.8% (357/559) plan to apply for another role within Bluestone
- 13.6% (77/561) plan to leave Bluestone within the next 6 months
- 80.3% (453/562) plan to stay at Bluestone to progress their career
- 62.9% (354/562) believe Bluestone puts people before product and profit
- 79.0% (446/562) plan to stay within the leisure and hospitality industry
- 75.5% (426/561) receive regular, fair and accurate feedback about their work
- 83.3% (470/560) say the training they have received has increased their motivation within their role
- 79.6% (449/560) say that there is someone at work who encourages their progression and development

Analysis

Detailed breakdowns of statistics are available on Power BI, this report deals with the company as a whole.

Response Rates

The following departments achieved a response rate of 85% of higher – HR/H&S/CSR, Security, Guest Services, Finance, Sales, Blue Lagoon, IT/MI/PA's & Projects, Spa/L&D, Retail, Facilities (Maint/Enviro/Bike Hire), Food & Beverage, Marketing/Revenue Management & Activities.
The following departments had below 85% as a response rate
Housekeeping – 59.5%
HOD's – 72.7%
Entertainments – 73.3%

Overall response rate was 78.4%

Note: Certain departments exceeded 100% (Guest Services, Security & HR/H&S/CSR) causes of this could be multiple entries or the HOD selected the department instead of HOD as an actual department.

Recommend Bluestone as a place to work

Overall recommend Bluestone as a place to work NPS is 28.2% compared to 30% last year and 27% in the December annual survey.

Top 3 Departments for NPS score are HODs 87.5%, Finance 54.5% and Sales 47.4%. Bottom 3 Departments are Entertainments 9.1%, Facilities (Maint/Enviro/Bike Hire) 13.2% and Retail 18.2%

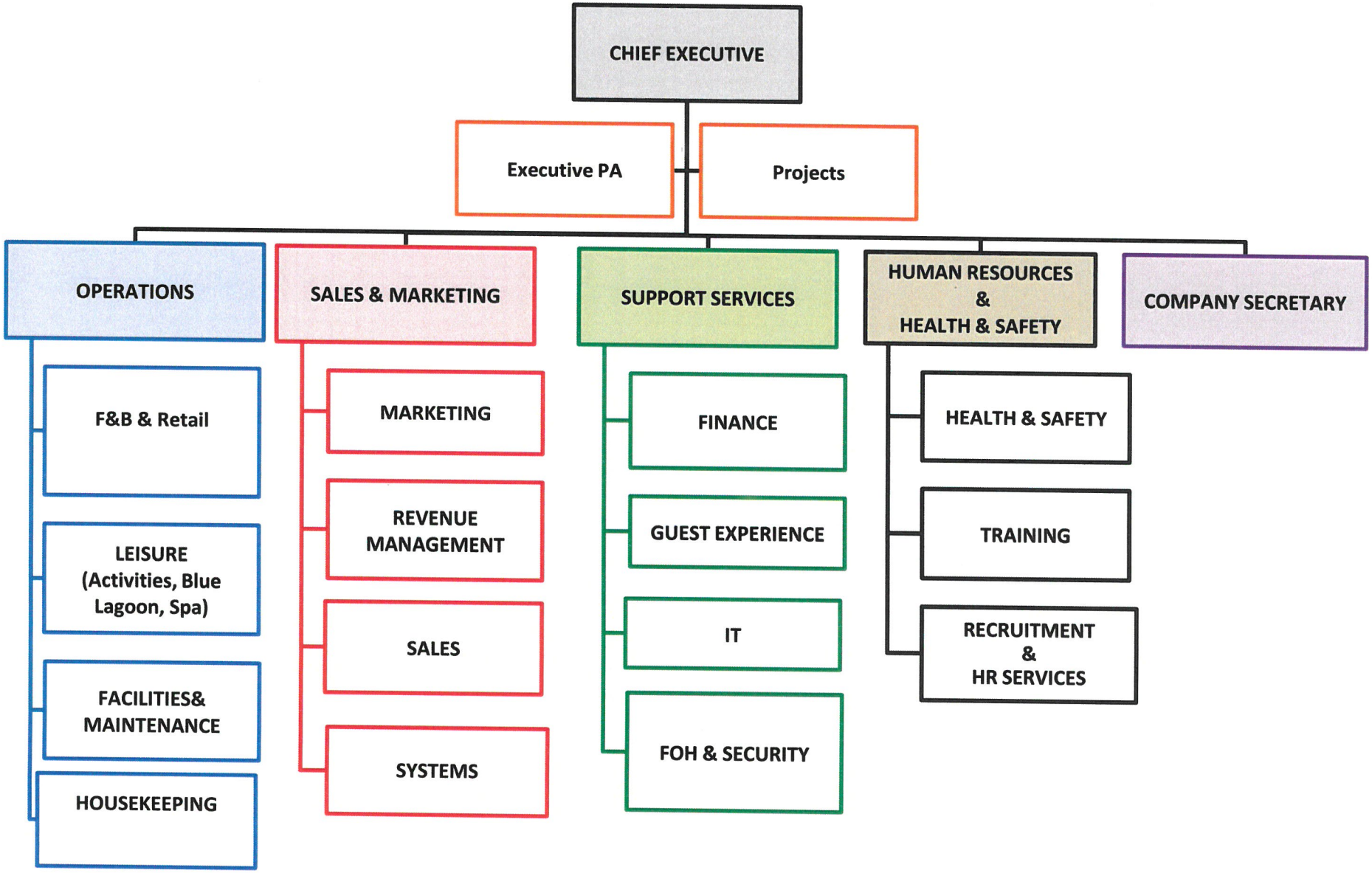
Recommend their Department as a place to work

Overall recommend their department as a place to work NPS is 25%, over 3% lower than the recommend company score of 28.2%. It can be assumed from this that staff would recommend Bluestone as a place to work higher than their own department.

EVO8

Overview – Organisational Structure

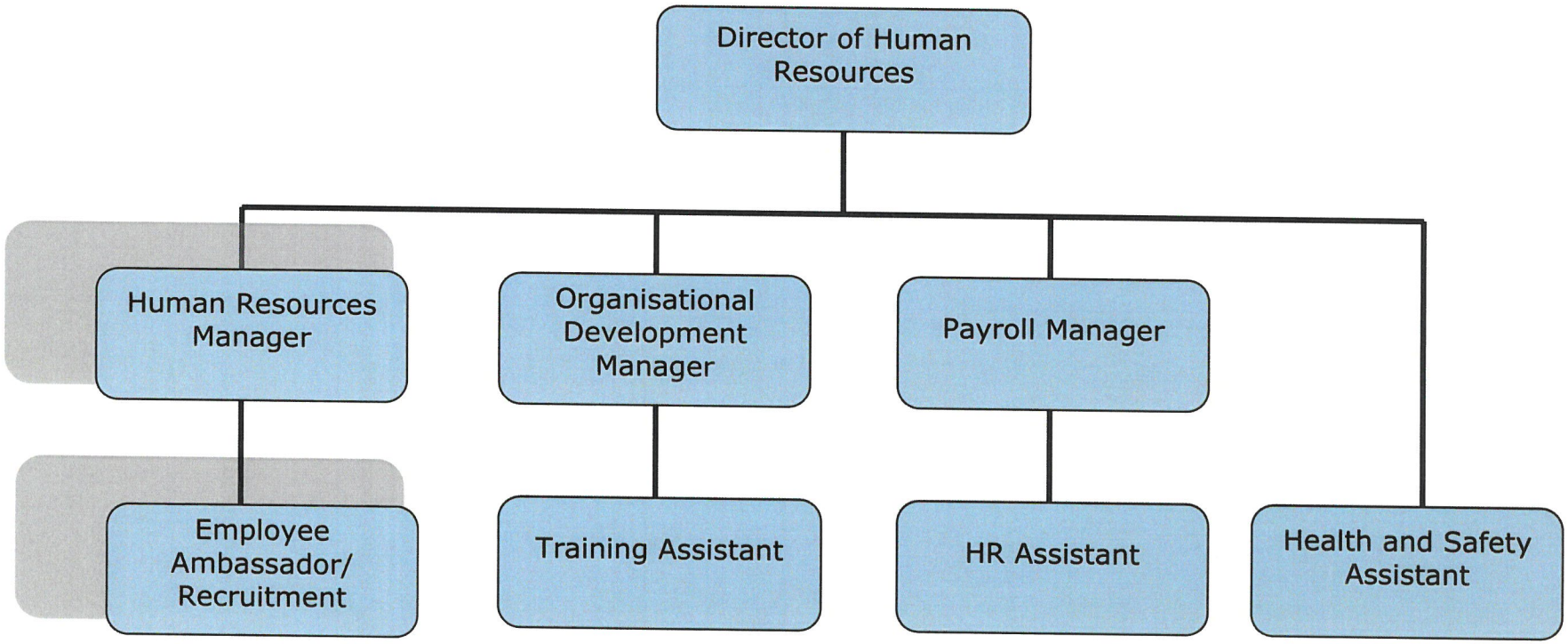
bluestone
national park resort



EV09

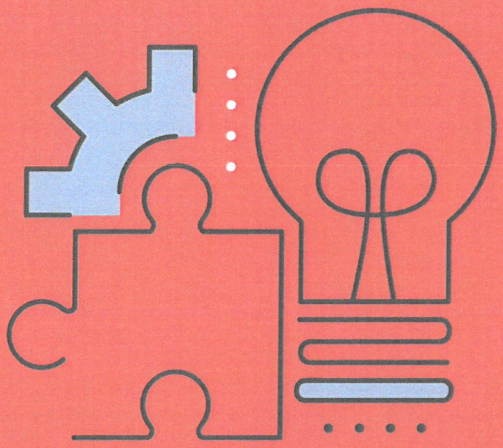
Bluestone Leisure Ltd

Human Resources Organisational Structure



EV10

COACHING AND MENTORING



An introduction to coaching and mentoring for managers.
Book onto the next training course to find out more and become a Bluestone coach.

Unlocking a person's potential to maximise their own performance. It is helping them to learn rather than teaching them" (Whitmore 2003)

Non-directive leadership maximises potential and drives performance. It involves:

- Listening to understand
- Reflecting
- Paraphrasing
- Summarising
- Asking questions
- Making suggestions
- Giving feedback
- Offering guidance
- Giving advice

What is directive leadership?

- Solving someone's problems for them
- Instructing

COACHING AND MENTORING TRAINING SESIONS RUNNING THROUGHOUT APRIL AND MAY. FOR DATES, TIMES AND LOCATIONS PLEASE VISIT THE TRAINING CALENDAR.

EV11

From: Carla Roberts
Sent: 08 March 2020 11:09
To: Carla Roberts
Subject: RE: Promoting Coaching and Mentoring Successes

From: Carla Roberts
Sent: 20 February 2020 14:02
To: Claire Lewis
Subject: RE: Promoting Coaching and Mentoring Successes

Thanks, just spoken to Mike and he's going to send his story straight into the comms brief inbox ☺

Carla

From: Claire Lewis
Sent: 20 February 2020 11:58
To: Carla Roberts
Subject: RE: Promoting Coaching and Mentoring Successes

Hi Carla,

Yes definitely, Mike is a great example of how coaching and mentoring can help someone. Hopefully it will encourage people to receive coaching etc ☺

Kind Regards,
Claire Lewis
Head of Learning and Development
Bluestone National Park Resort

From: Carla Roberts
Sent: 20 February 2020 11:02
To: Claire Lewis
Subject: Promoting Coaching and Mentoring Successes

Hi Claire,

I was thinking that to get people on-board with coaching and mentoring it would be good to give a success story of how it has impacted someone. I thought of Mike, as Debbie mentored him for several years while he was progressing up the ranks. Would you be happy for me to ask him to do a story and I can get it in the next comms brief?

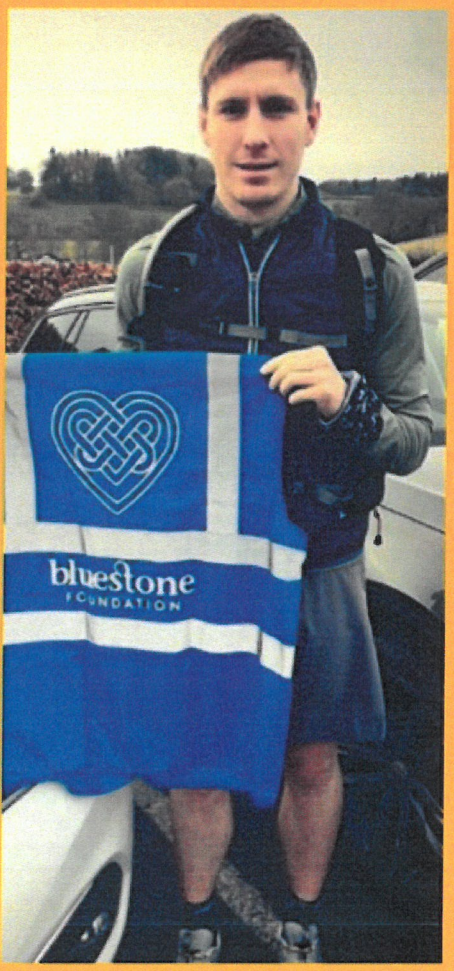
Carla

EV12

BLUESTONE JOURNEY

SUCCESS STORY

Mike Slack



I've worked at Bluestone for just over 10 years. I started as a Lifeguard at the Blue Lagoon and before long an opportunity arose to apply for a Senior Lifeguard role where I was fortunately successful. From this, hard work and determination allowed me to apply for another role as a Manager on Duty at the Blue Lagoon and before I knew it I was on a career path, after only being at Bluestone a short two years. My time as an MOD was varied where I took on a line manager role, into a Health & Safety Role then into an assistant manager role, all within another two year period. It was during that period that I met Chloe [who works in Guest Services] and we have been happily married for over two years. On May 1st 2014 I was successful as the New Blue Lagoon Manager and this is where my career became an eye opener and a steep learning curve, something that was achievable as I was given the support and the tools by a fantastic Mentor in Debbie Rainbow.

During 2015 the Blue lagoon became a part of the overall Leisure team and joined the Activities, Entertainment & Spa departments in the mission to go from Good to Great. This came with another exciting opportunity to become the Leisure Safety & Compliance Manger where I was able to develop a passion of mine around the safety and wellbeing of our guests and staff within all of the Leisure functions. Again this was supported with accredited qualifications and mentoring, but this time from our new Leisure Head of Department, James McNamara.

During early 2017 I was fortunate to be promoted to the Leisure Services Manager, overseeing the Blue Lagoon, Activities & Entertainments for our guests and working directly with our Head of Department to focus on the strategy our CEO had put in place to fulfill our guest journey and become a part of the implementation of an exciting new facility that we now know and love as Serendome. The UK's 1st giant umbrella came with some challenges when creating the relevant documents, however the guidance and mentoring I had received over the nine years previously, allowed me to work with the right people and develop the right systems with the team to allow a successful operation in the new facility.

Over the past 10 years I have also been fortunate to visit several attractions and countries as part of my role where we look to identify new innovative ideas that we can use at Bluestone. Trips included time in London, Amsterdam, the Netherlands and most recently, Florida

I am currently the Deputy Head of Leisure and am continually learning. This is a journey I can see potentially lasting a lifetime.

EV13

Coaching and Mentoring Meeting – 18 February 2020

Attendees:
Claire Lewis (Head of Learning and Development)
Carla Roberts (Senior People Services Officer)

Ideas
Posters with benefits
Coaching champions

Poster
Benefits of coaching
Myth busting?
Confirm managers on-board so within work time

Coaching champions

Who/Where:
Different levels
Meet in training room
HOD: Claire Lewis (L&D)
TLT: Debbie Downes (HSK)
Junior Manager: Jenna Cleevely (Retail)
Supervisors: Gemma Burton (Guest Services), Shannon Richards (F&B)
Assistants: George Lander (Blue Lagoon), Sherice Craig (Activities), Leonie Morgan (Spa).

What/Why/When:
Quarterly meetings
Discuss C&M activity
Evaluate processes
Promote benefits to others

Action:
Create poster to promote benefits of C&M
Email chosen people to get them on-board
First meeting end of March

EV134

From: Carla Roberts
Sent: 08 March 2020 14:51
To: Carla Roberts
Subject: RE: Coaching and Mentoring Champion Group

From: Carla Roberts
Sent: 24 February 2020 13:49
To: Debbie Downes; Jenna Cleevely; Gemma Burton; Shannon Richards; George Lander; Sherice Craig; Leonie Morgan
Cc: Claire Lewis
Subject: Coaching and Mentoring Champion Group

Hi all,

We would like to create a group of champions for coaching and mentoring within Bluestone, to promote it to other employees and to make sure it works for the individuals as well as for managers.

As we'd like a fair representation from all departments and from all levels, we have chosen you to be on the group! This is a great opportunity to get involved in making a difference to your working environment. The meetings will only be every quarter, so it should not take too much of your time. You will be supported throughout by Claire, who will chair the meetings.

The first meeting will be held on Wednesday 25th March. I will send a calendar invite out to you shortly.

If anyone has any concerns or questions please let myself and Claire know, but the first meeting should cover everything.

Kind Regards,
Carla Roberts
Senior People Services Officer
Bluestone National Park Resort

EV15



COACHING AND MENTORING AT BLUESTONE

WHY AND HOW YOU CAN GET INVOLVED

WHO CAN GET INVOLVED

I All employees are eligible to apply to be on the coaching and mentoring programme, where you will be assigned a coach/mentor based on your needs.

WHEN DOES IT HAPPEN?

As part of our ongoing initiative for employees to learn and develop, this scheme is o be within work time and paid.

HOW DO I GET INVOLVED?

You can speak to your line manager or you can contact a member of the Learning and Development team by emailing: learninganddevelopment@bluestonewales.com

WHAT IS COACHING AND MENTORING?

Definition

Whitmore, 2003

-Unlocking a person's potential to maximise their own performance. It is helping them to learn rather than teaching them" (Whitmore 2003)

Coaching is used to enable an employee achieve their goals through converations, listening and guiding them tp the best solutions.

Mentoring is similar to coaching, but it more directive and involves an element of teaching.

WHAT ARE THE BENEFITS?

Improved performance

Learn new ways of thinking
Become more solution focused
Make good decisions

Wellbeing

Feel more confident
Become more resilient
Overcome barriers
Discuss personal issues

Job Satisfaction

Be more engaged at work
Build relationships
Reflect on your behaviours
Feel motivated

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national park resort

EV16 - pg 1

Coaching and Mentoring Policy

Purpose

Bluestone puts 'people' at the centre of its values, and aims to develop and mould employees to be the best versions of themselves. Through coaching and mentoring, employees will see an increase in their performance and will be more engaged and motivated.

Buddy System

Each Bluestone employee will be assigned a 'buddy' upon their employment commencing. This buddy will be a peer-mentor and will actively help and encourage the new starter. This will be through instructing, guiding and offering support.

Line Manager Mentoring

Once an employee's probation has been passed, their line manager or supervisor will become their coach. This type of coaching will help the employee to learn, rather than teaching them. This will unlock their potential in order the maximise their performance. Managers and supervisors are required to meet with their coachees and mentees at least every quarter, and discussions are to be recorded and sent to HR to add to their employee files (unless of a confidential nature).

Peer Mentoring

New resort managers will be assigned an existing resort manager to help guide them to deal with different scenarios. This will involve shadowing, de-briefing and discussing case studies.

Personal Development Plans

PDP meetings will involve coaching from the appraiser to the appraisee, discussing options on how to develop and become the best version of themselves. This is to be done at least once a year.

Coaching Champions

A team of coaching champions are available to discuss feedback with. There will be regular feedback sessions for coaches, as well as for coachees. The team will also encourage further participation and will keep evaluation forms up to date.

Coaching Training

Training is available for those who wish to become coaches. A short course is run over two days in-house with dates available on the training calendar. An accredited course is available for some managers; this external course is six days and provides you with an ILM Level 5 Certificate in Coaching and Mentoring in Management. To book onto either course, please email learninganddevelopment@bluestonewales.com.

Evaluating Coaching and Mentoring

We continuously strive for excellence for both our guests and our employees, therefore evaluating the effectiveness of training is extremely important. Coachees, mentees, coaches and mentors will

be invited to give their feedback on how the coaching and mentoring is going. This is in the form of feedback sessions and evaluation forms. The Learning and Development team will also analyse performance and engagement to understand the impact of the coaching and mentoring activities.

From: Carla Roberts
Sent: 08 March 2020 14:58
To: Carla Roberts
Subject: RE: CM Policy

From: Claire Lewis
Sent: 28 February 2020 16:39
To: Carla Roberts
Subject: RE: CM Policy

Hi Carla,

No that looks great now, thanks. I've added it into the draft L&D policy but I still need to finalise a few other bits before the policy gets sent out.

Thank you again for your help!

Claire

Kind Regards,
Claire Lewis
Head of Learning and Development
Bluestone National Park Resort

From: Carla Roberts
Sent: 28 February 2020 14:54
To: Carla Roberts
Subject: CM Policy

Hi Claire,

As discussed, please find the policy attached that I've written on coaching and mentoring. I've made the changes we discussed but if you notice anything else let me know.

Thank you!

Kind Regards,
Carla Roberts
Senior People Services Officer
Bluestone National Park Resort

EV18

From:	Carla Roberts
Sent:	08 March 2020 15:17
To:	Carla Roberts
Subject:	RE: Appraisals / PDPs - Coaching

From: Carla Roberts
Sent: 03 March 2020 15:16
To: Manager
Cc: Claire Lewis
Subject: Appraisals / PDPs - Coaching

Hi all,

Just a reminder that all appraisals and PDP meetings should be followed up with coaching activity going forward. This plan should be added to the PDP as the activity undertaken to achieve the objectives.

E.g. if the objective is 'to become more solution focussed' then the activity would be 'coach them on different problem solving scenarios and observe progress'.

Once complete, please send the PDP back to HR Admin to be saved onto their employee files.

If you have any questions regarding coaching please let myself or Claire know.

Thank you! ☺

Kind Regards,
Carla Roberts
Senior People Services Officer

EV19

From: Carla Roberts
Sent: 08 March 2020 16:55
To: Carla Roberts
Subject: RE: Coaching Training

From: Carla Roberts
Sent: 25 February 2020 16:51
To: Manager
Cc: Claire Lewis; Kial Keane
Subject: Coaching Training

Hi all,

As you know, HODs have recently received training from Dawn on coaching and mentoring. Now that we have started the coaching process with them we are rolling this training out to all managers and supervisors.

The course is internal and is two days. The dates are on the intranet, and can be found HERE.

Please add your name to the list to be booked onto the session. Alternatively you can email Kial who will book you onto the relevant dates. You will notice that there are 6 separate sessions running throughout April and May.

If you have any questions please let me know.

Thanks all! ☺

Kind Regards
Carla Roberts
Senior People Services Officer

EV20

From: Carla Roberts
Sent: 08 March 2020 17:11
To: Carla Roberts
Subject: RE: Level 5 Coaching and Mentoring Course

From: Carla Roberts
Sent: 05 March 2020 10:08
To: Heads of Department
Subject: Level 5 Coaching and Mentoring Course

Hi all,

As you've attended the internal Coaching and Mentoring course with Dawn and have begun coaching your staff, we are giving you the opportunity to further your knowledge of coaching by attending an external course.

The course is fully accredited and will give you an ILM Level 5 in Coaching and Mentoring in Management; it is 6 days with several dates available. This will be great for your CPD and will be really beneficial for your department.

If you would like to attend, please let me know as soon as possible. If we have enough interest they might be able to hold it at Bluestone instead.

Any questions, let me know.

Thanks all!

Kind Regards,
Carla Roberts
Senior People Services Officer
Bluestone National Park Resort

EV21

From:	Carla Roberts
Sent:	08 March 2020 20:27
To:	Carla Roberts
Subject:	Buddy Assignment
Attachments:	Buddy Guidance.pdf

From: Carla Roberts
Sent: 05 March 2020 16:52
To: Manager
Cc: Claire Lewis; Jessica Krelle
Subject: Buddy Assignment

Hi all,

As you know, the 2 week review forms ask you to name who the new starter's buddy is. I have noticed recently that a few of these are being left blank; please ensure that every new member of staff is assigned a buddy.

The buddy is there to act as a mentor for that person; it is most often a peer but can be a supervisor if needs be. The role of the buddy is to answer any questions, train them on certain procedures, let them know where to find things (e.g. the intranet, Flow, the canteen) and to provide them with the tools to succeed within their probation.

If anyone needs any assistance with this please let me know. I have attached some guidance on how to be a good mentor, so please share this with whoever is selected.

Thank you!

Kind Regards,
Carla Roberts
Senior People Services Officer
Bluestone National Park Resort

EV22

BUDDY SCHEME

Remember your first day working for Bluestone? What was it like? Were you nervous? Did you have lots of questions? Did your new job seem daunting?

If you answered yes to any of those questions you will understand how having someone to help you and answer your quesions would be massively helpful!

What is my role as a buddy?

- Answer any queries
- Give them a tour on their first day
- Go to lunch with them for their first week
- Show them where the welfare facilities are
- Give them training on processes and systems
- Encourage them
- Introduce them to others
- Talk about your experiences

As long as you are trying to make them feel comfortable and support their learning then you are doing it right!

Want to become a buddy? Speak to your line manager! Get involved and be part of others' success.

EV23

Coaching and Mentoring Evaluation – Meeting 6th March 2020

Attendees: Carla Roberts, Claire Lewis, Jessica Krelle

Overview:

Need to evaluate coaching and mentoring - feedback from coaches/mentors, and coachees/mentees

Actions:

Action	Owner	Completion Date
Monitor who is receiving coaching then set up a feedback session	CR	Every month
Meet with coaches on a quarterly basis to discuss how it's going, any queries / barriers / feedback / share stories (confidentially)	CL	Every quarter
Liaise with HODs about performance and report to HR/L&D	CL	Every quarter
Create evaluation form for all participants	CR	31st March 2020
Circulate success stories to Coaching Champion group	CR	Ongoing